



SubFinder for Administrators

Internet Users Guide for SubFinder 5.8
Site-Based Management



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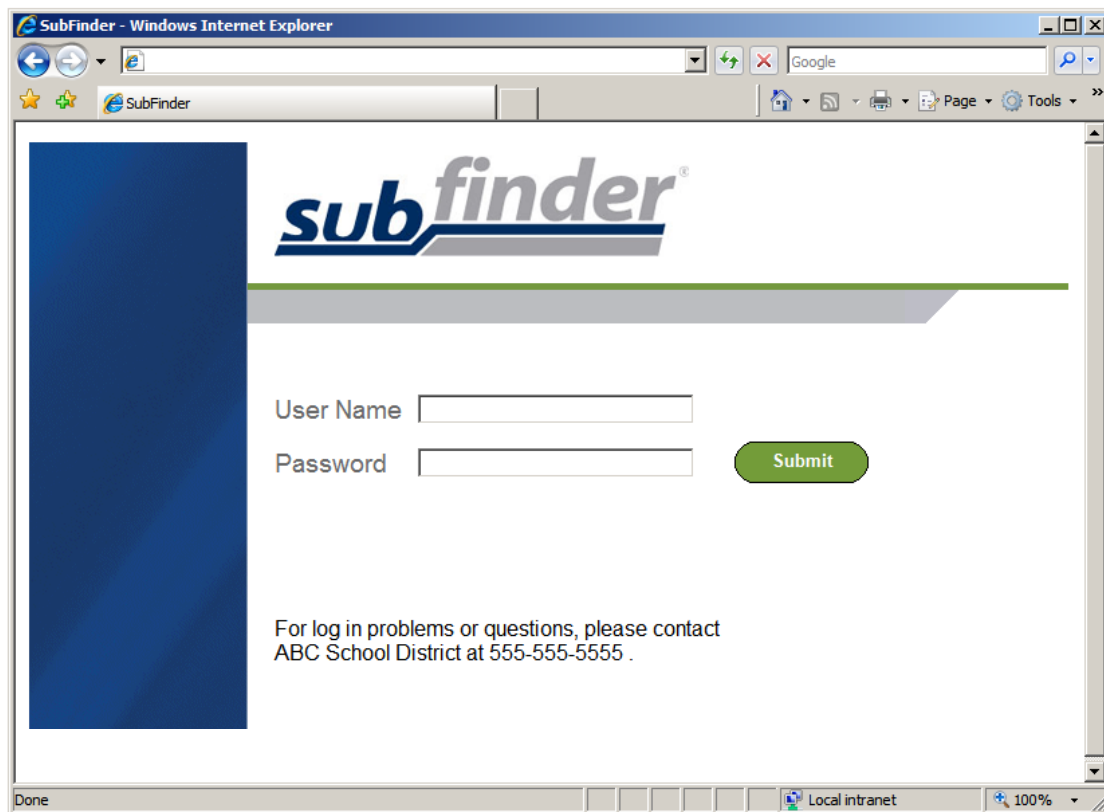
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SubFinder

Using SubFinder online, administrators can quickly accomplish routine tasks such as adding jobs, reviewing jobs, and running reports along with added editing capabilities at the site level. Site-based administrators can have easy-to-use, secure Internet access to many of the same features available to the SubFinder operator.

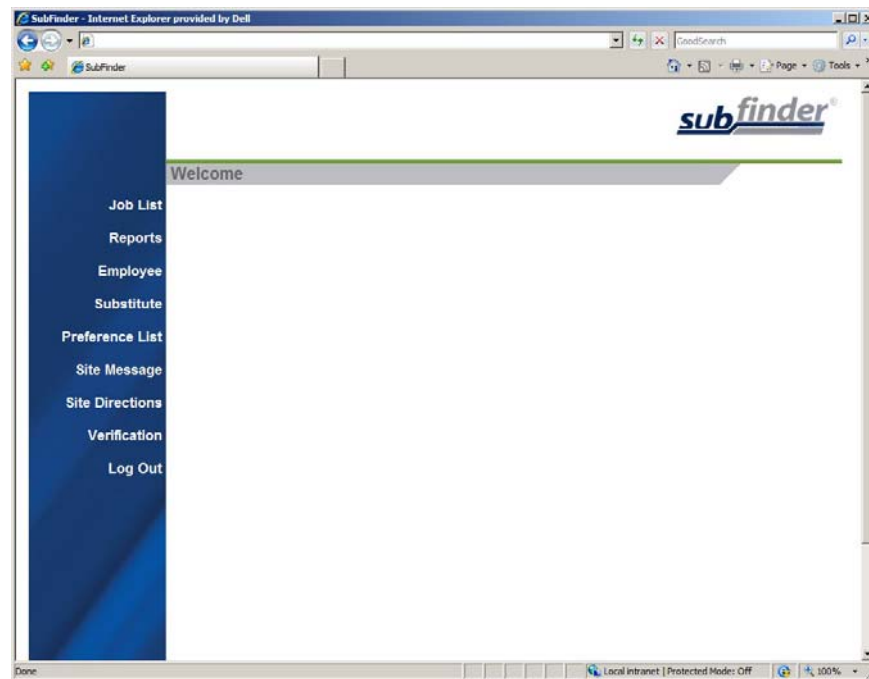
How Does It Work?

SubFinder online works in conjunction with your SubFinder system. It uses the existing database and compliments the telephone operation of SubFinder. With it you can access SubFinder from any computer using Internet Explorer 5.5 or higher as its browser. Simply enter your district's web address for SubFinder in your Internet browser address line, press **Enter** on the keyboard, and the SubFinder Log In screen will appear.



System Access

To access SubFinder, simply enter your **User Name** and **Password** (provided to you by your district office) and then click **Submit**. The opening screen will appear:



The SubFinder menu options are located on the left side of the screen. These options include **Job List**, **Reports**, **Employee**, **Substitute**, **Preference List**, **Site Message**, **Site Directions**, **Verification**, and **Log Out**. Your specific options will be based on the rights assigned to you by your SubFinder Operator. If you do not have access to one or more of these areas, the corresponding button will not appear on this screen.

Each of these options will be covered in the sections that follow.

Job List


The area is used to add, modify, or view absences and jobs for your site. Click on **Job List** and the following screen will appear:

Edit	ID	Date/Time	Name	Site	Spec Instr	Log
Edit	85	11/15/2007 08:00 AM	Supplementary Assignment	Benton Elementary	None	Log
Edit	84	11/15/2007 07:30 AM	Samuels, Mickey	Benton Elementary	Text	Log
Edit	83	11/15/2007 07:30 AM	Payton, Kamil	Benton Elementary	None	Log
Edit	74	11/15/2007 07:30 AM	Quick, Leslie	Benton Elementary	None	Log

Reviewing Jobs

To review existing jobs, choose the appropriate combination of the six available filters - **Site**, **Employee**, **Substitute**, **Type**, **Status**, and **Date**. To choose a filter, place a check in the box next to the criteria you wish to use. You can also select how the jobs will be displayed; choose either **Date & Time** or **Job ID**.

NOTE: To search by employee or substitute, place a check in the appropriate box and then click on the **+** button located directly to the left of the Name Display field. A list of all applicable employees or substitutes will be displayed. You can use the up or down arrows at the end of the field to navigate one page at a time within the list. When you find the desired name, click on it. The field will automatically populate with the selected name and the drop down will disappear.

You can also search by employee or substitute by clicking the  button to the left of the Name Display field. A box will appear where you can type the employee's or substitute's name. Type the name and press enter; this will narrow the search. You will then need to click on the **+** button and click on the appropriate name. The field will automatically populate with the selected name and the drop down will disappear.

Once you have made your selections, click **Run Request**. A list of jobs matching the selected criteria will appear in the Job List window at the bottom of the screen. Find the job you wish to review in the list presented and click the **Edit** hyperlink for that job. The following screen will be displayed:

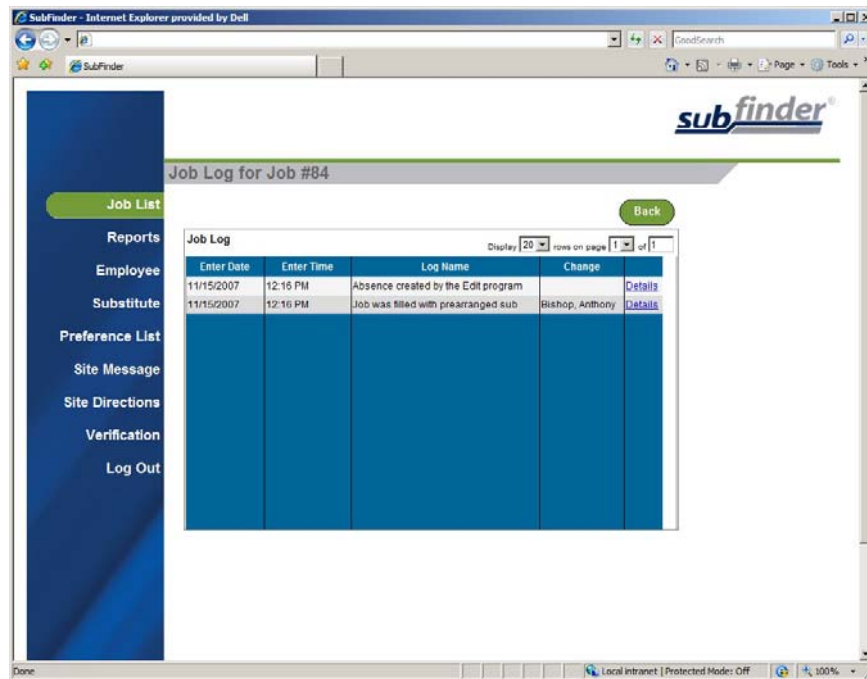
You can see all the details for the job on this screen. You will also be able to edit the job from this screen. Simply make the necessary changes and click **Save Job** at the bottom of the page. This will update the changes you made to the job.

NOTE: If the job or a portion of the job is in the past, the employee field will not be available for editing.

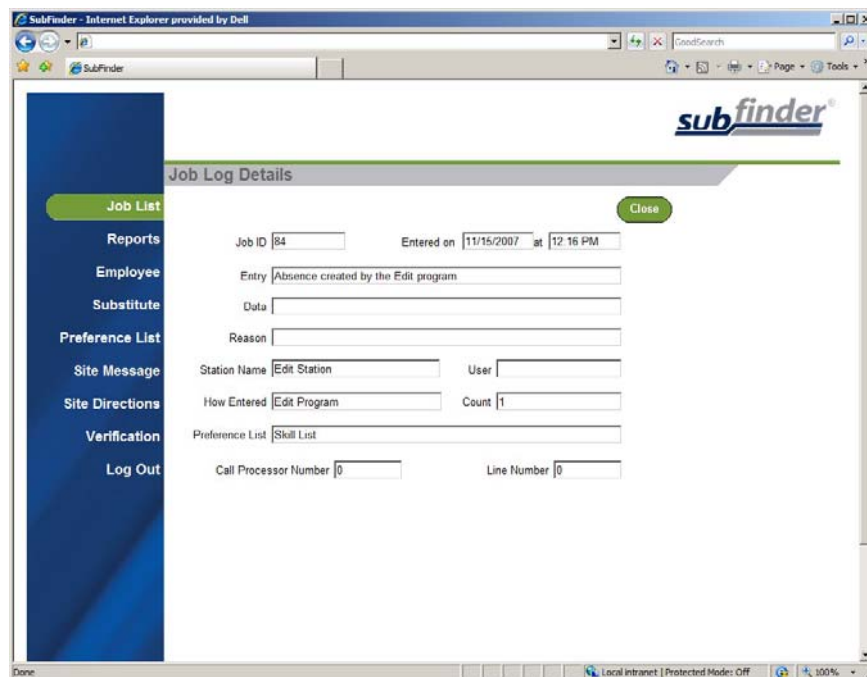
The Job Log

Each time an absence or job is created, SubFinder creates a job log to record the activity that occurs. The job log starts with the creation of the absence or job and continues until the job is archived.

The Job Log for a specific absence/job can be accessed from the Job List; simply click the **Log** hyperlink to the right of the appropriate job. The following screen will appear:



To see more detail about a particular job log entry, click on the **Details** hyperlink to the right of the entry.



The Job Log details screen will give you more specific details on the selected entry. The information may include (if applicable) the name of the substitute, how the entry was made, the preference list the entry was from, and the line number the call was processed on.

When you are finished viewing the information, click **Close** and you will be returned to the previous screen. Then click **Back** (located just above the Job Log box) and you will return to the Job List.

Adding an Absence

To add an absence, click on **Add New Absence**. The following screen will appear:

The screenshot shows a web browser window titled 'Subfinder - Internet Explorer provided by Dell'. The address bar shows 'GoodSearch'. The Subfinder logo is in the top right. A left-hand navigation menu includes links for Job List, Reports, Employee, Substitute, Preference List, Site Message, Site Directions, Verification, and Log Out. The main content area is titled 'Add Job'. It contains several sections: 'Add a Job:' with fields for Site (Benton Elementary), Employee (Abel, Abby), CalendarTrack (Standard), Position (Elementary Grade 1), and Reason (A100 Sick leave); 'Absence Info' with Start date/time (11/15/2007 09:00 AM) and End date/time (11/15/2007 02:00 PM), and radio buttons for 'Follow Employee Schedule' (selected) and 'Same Time Daily'; 'Job Info' with identical date/time fields and radio buttons; an 'Enter Misc Code' field; and 'Job Type' (Substitute Required) and 'Job Status' (Unfilled) dropdown menus. The status bar at the bottom indicates 'Local intranet | Protected Mode: Off' and '100%' zoom.

- **Site:** If you are a single-site administrator, the correct site name will automatically appear in this field. If you are a site-group administrator, click on the dropdown arrow and select the site where the absent employee works.
- **Employee:** Select the employee for whom you wish to create the absence. To select a specific employee, click on the arrow at the end of the employee field and choose the desired person from the list presented.
- **Calendar Track:** This is the calendar track the absent employee's schedule follows. This will be populated automatically when you select an employee.
- **Position:** This is the job position the absent employee works. This will automatically populate when you select an employee.
- **Reason:** Select the reason the employee is absent from the drop down list provided.
- **Absence Start Date/Time and End Date/Time:** These values will default to the current date and the standard work times for the selected employee, but may be changed as needed. Dates should be entered using the format MMDDYY. For example: January 11, 2008 would be entered 011108. Using this format, the slashes (/) will be entered automatically when you tab out of the field. Times should be entered using the format HHMM/P. For example: 7:30 a.m. would be entered as 0730A. Using this format, the colon (:) will be entered automatically when you tab out of the field.
- **Follow Employee Schedule:** Follow Employee's Schedule is the default and means that each day of the absence will follow the standard work times for that employee.
- **Same Times Daily:** Same Times Daily means that the absence will be reported for the same times each day of the absence. This option typically does not become important unless you have reported a non-standard, multiple day absence for the employee.

For example: The employee's standard work day runs from 7:45 a.m. until 2:35 p.m. A three-day absence is reported that starts at 11:15 a.m. on Monday and runs until 2:35 p.m. on Wednesday. Choosing Employee's Schedule would result in a 2 ½ day absence – 11:15 to 2:35 on Monday and 7:45 until 2:35 on Tuesday and Wednesday. Choosing Same Times Daily would result in a 1 ½ day absence – 11:15 to 2:35 on Monday, Tuesday and Wednesday (three half-days).

- **Job Start Date/Time and End Date/Time:** These values will default to the same values as the Absence Start Date/Time and End Date/Time, but may be changed as needed. Dates should be entered using the format MMDDYY. For example: January 11, 2008 would be entered 011108. Using this format, the slashes (/) will be entered automatically when you tab out of the field. Times should be entered using the format HHMM/A/P. For example: 8:25 a.m. would be entered as 0825A. Using this format, the colon (:) will be entered automatically when you tab out of the field.
- **Follow Employee Schedule:** Follow Employee's Schedule is the default and means that each day of the job will follow the standard work times for that employee.
- **Same Times Daily:** Same Times Daily means that the job will be reported for the same times each day of the job. This option typically does not become important unless you have reported a non-standard, multiple day job for the substitute.

For example: The employee's standard work day runs from 7:45 a.m. until 2:35 p.m. A three-day absence is reported that starts at 11:15 a.m. on Monday and runs until 2:35 p.m. on Wednesday. Choosing Employee's Schedule would result in a 2 ½ day absence – 11:15 to 2:35 on Monday and 7:45 until 2:35 on Tuesday and Wednesday. Choosing Same Times Daily would result in a 1 ½ day absence – 11:15 to 2:35 on Monday, Tuesday and Wednesday (three half-days).

- **Select or Enter Misc. Code:** If your site uses miscellaneous codes for the absence reason you selected, you can enter the code by typing it in the text field or by using the drop down list to select the appropriate code.
- **Job Type:** Select the Job Type from the drop down list. You can choose from the following:
 - **No Substitute Required:** No substitute coverage is required for the absence.
 - **Prearranged Substitute:** You already have a substitute who has agreed to fill the absence.
 - **Requested Substitute:** You would like SubFinder to attempt to fill the absence with a particular substitute. SubFinder will call the requested substitute exclusively until the Stop Calling Requested Substitute deadline is met. If the substitute has not been secured at that point, SubFinder will begin using the preference list(s) and skill list.
 - **Substitute Required:** You would like SubFinder to find a substitute for you using the absent employee's preference list(s) and skill list.
- **Job Status:** Depending upon the Job Type selected, one of the following will automatically be assigned:
 - **Filled:** The absence is filled with an appropriate substitute. This status will be automatically applied to Prearranged Substitute absences.
 - **Unfilled:** SubFinder needs to do some work to fill the absence. This status will be automatically applied to Requested Substitute or Substitute Required absences.
 - **None:** This status applies only to No Substitute Required absences.
- **Substitute:** If the Job Type is Prearranged Substitute or Requested Substitute, you must provide SubFinder with the name of the particular substitute. Select the desired substitute from the list provided.

- **Special Instructions:** If you want to leave special instructions for this job, click in the text field and type in the special instructions.

When you have entered all the applicable information, click **Save Job** at the bottom of the screen.

Adding a No Employee Job

There may be times when you need a substitute at your site but do not have an absent employee associated with the job. For example: your site is conducting standardized testing and you need substitute coverage in the classrooms left vacant by the teachers administering the exam. Instead of adding an absence, you will want to add a job. To add a job, click **Add No Employee Job**. The following screen will be displayed:

The screenshot shows the 'Add No Employee Job' page in the Subfinder application. The page has a blue sidebar on the left with navigation links: Job List, Reports, Employee, Substitute, Preference List, Site Message, Site Directions, Verification, and Log Out. The main content area is titled 'Add No Employee Job' and contains the following fields:

- Employee:** A dropdown menu.
- No Employee:** A dropdown menu.
- Reported on:** 11/15/2007 1:23 PM
- Site:** A dropdown menu with 'Benton Elementary' selected.
- Number of jobs:** A text input field with '1' entered.
- Calendar Track:** A dropdown menu with 'Standard' selected.
- Position:** A dropdown menu with 'Accounts Payable' selected.
- Reason:** A dropdown menu with 'A100 Sick leave' selected.
- Job Info:**
 - Start date/time:** 11/15/2007 07:30 AM
 - Stop date/time:** 11/15/2007 03:00 PM
 - ☐ Follow Employee Schedule
 - ☐ Same Time Daily
- Enter Misc Code:** A text input field.
- Pref List:** A dropdown menu with 'Skill List' selected.
- Job Type:** A dropdown menu with 'Substitute Required' selected.
- Job Status:** A dropdown menu with 'Unfilled' selected.
- Please enter special instruction:** A text area.

- **Site:** If you are a single-site administrator, the correct site name will automatically appear in this field. If you are a site-group administrator, click on the dropdown arrow and select the site that needs extra substitutes.
- **Number of Jobs:** Enter the number of jobs you want to create. When creating more than one job at a time, remember:
 - All jobs created will have the same job position.
 - You cannot prearrange or request specific substitutes when creating more than one job at a time.
- **Calendar Track:** Select the calendar track the job(s) will follow.
- **Position:** Select the job position for the job(s).
- **Reason:** Select the appropriate reason from the drop down list provided.
- **Job Start Date/Time and Stop Date/Time:** Enter the dates and times that a substitute is required. The times will default to the standard open and close times for the selected site, but may be changed as needed. Dates should be entered using the format MMDDYY. For

example: January 11, 2008 would be entered 011108. Using this format, the slashes (/) will be entered automatically when you tab out of the field. Specific start and end times should be entered in an HHMM A/P format. For example: 7:30 a.m. would be entered as 0730A. Using this format, the colon (:) will be entered automatically when you tab out of the field.

- **Same Times Daily:** SubFinder will automatically default to Same Times Daily for No employee jobs.
- **Select or Enter Misc. Code:** If your site uses miscellaneous codes for the absence reason you selected, you can enter the code by typing it in the text field or by using the drop down list to select the appropriate code.
- **Preference List:** If you want to select a specific preference list when filling this job, select the list from the drop down list presented.

NOTE: If you select a preference list, SubFinder will use ONLY that list when trying to fill your job. SubFinder will NOT use the Skill List. If no list is selected, SubFinder will only use the Skill List when filling the job.

- **Job Type:** Select the Job Type from the drop down list. You can choose from the following:
 - **Prearranged Substitute:** You already have a substitute who has agreed to fill the absence.
 - **Requested Substitute:** You would like SubFinder to attempt to fill the absence with a particular substitute. SubFinder will call the requested substitute exclusively until the Stop Calling Requested Substitute deadline is met. If the substitute has not been secured at that point, SubFinder will begin using either the preference list or skill list, depending which list you assigned to the job.
 - **Substitute Required:** You would like SubFinder to find a substitute for you using a preference list or the skill list.

NOTE: If you are creating multiple jobs at the same time you will have to select Substitute Required, as you cannot Request or Prearrange multiple substitutes.

- **Job Status:** Depending upon the Job Type selected, SubFinder will automatically assign one of the following:
 - **Filled:** The absence is filled with an appropriate substitute. This status will be automatically applied to Prearranged Substitute absences.
 - **Unfilled:** SubFinder needs to do some work to fill the absence. This status will be automatically applied to Requested Substitute or Substitute Required absences.
 - **None:** This status applies only to No Substitute Required absences.
- **Substitute:** If the job type is prearranged substitute or requested substitute, you must tell SubFinder who will be substituting. Select the desired substitute from the list provided.
- **Special Instructions:** If you want to leave special instructions for this job, click in the text field and type in the special instructions.

When you have entered all the applicable information, click **Save Job** at the bottom of the screen.

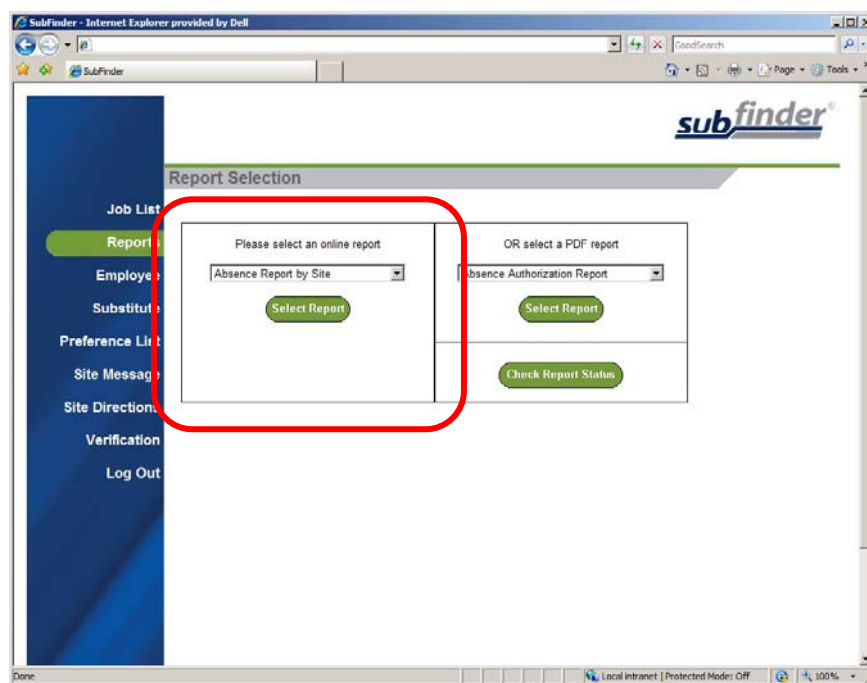
Reports

SubFinder offers two report options, providing a number of site or site group specific reports. The Online Report option provides access to seven commonly-used reports that include employee absence and substitute time worked data. The PDF Report option includes the same seven reports available with the Online Reports option *plus* an 9 additional reports that many administrators find valuable. Your district office has already selected which report type(s) they wish to make available.

To access the reports available within SubFinder, click on **Reports**.

Online Reports

If your district has elected to provide access to the Online Reports option, the indicated section will appear on your screen:



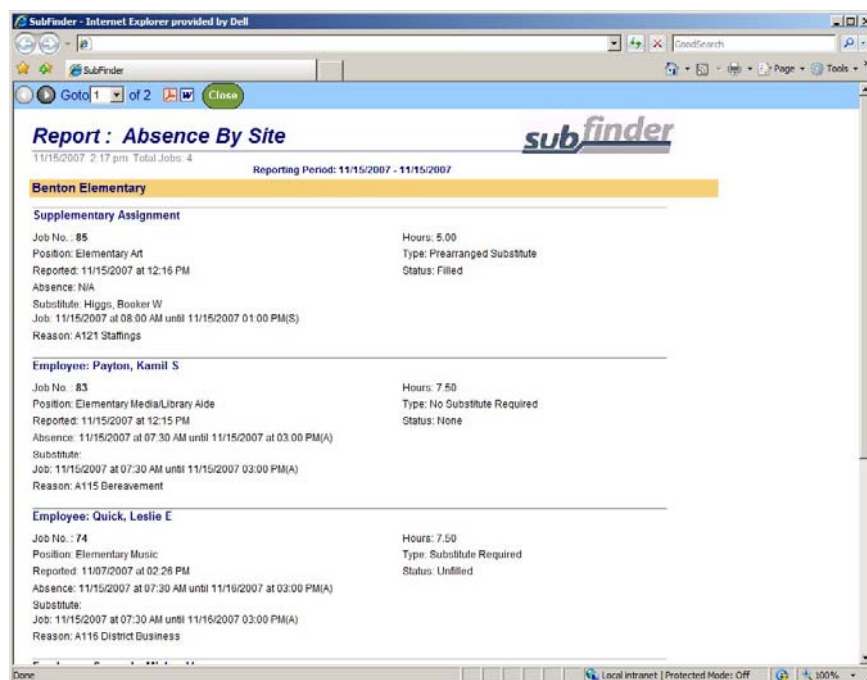
Using the drop down arrow, select the report you would like to run. You can select from the following reports:

- **Absence Report by Site:** This report provides absence information sorted by site and then by start date. While this report will include itinerant absences, they will only be displayed for the employee's home site, unless "Include Itinerant Jobs" has been selected in the filter criteria.
- **Absence Summary:** This report counts and summarizes the number of employee absences based on the following job types: substitute required and no substitute required.
- **Job Log:** This report provides a detailed account of the actions taken to fill an absence or job. It includes any changes made to the absence or job as well as the steps SubFinder took to fill it. This report can only be created for one job at a time. Please have the job ID number available to enter as filter criteria
- **Overall Substitute Jobs:** This report provides job information sorted by substitute and then by job start date.

- **Substitute by Site:** This report provides an alphabetical listing of all substitutes who will work at a particular site. You can also request only those substitutes which are available to work on a specified date or date range.
- **Verification – Absence Report by Site:** This report provides absence information sorted by site and then start date. While this report will include itinerant absences, they will only be displayed for the employee's home site. In addition to the filters available on the standard Absence Report by Site, this report also allows filtering by verify status and process status. Note: This report should only be used if your district is using SubFinder's Verification function.
- **Verification – Overall Substitute Jobs:** This report provides job information sorted by substitute and then start date. It will be continuous rather than using a separate page for each substitute. In addition to the filters available on the standard Overall Substitute Jobs report, this report also allows filtering by verify status and process status. Note: This report should only be used if your district is using SubFinder's Verification function.

After choosing the desired report, click **Select Report**.

After selecting a report, you will typically be presented with a report criteria screen. Use this screen to filter the report according to your specific needs. Most reports offer a variety of filters. If you do not want to filter the information included in the report, simply leave the boxes unchecked. Once you have made your selections, click **Generate Report**. SubFinder will generate the report and display it in a new browser window:



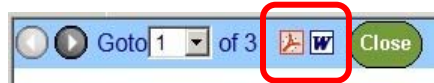
You may scroll through each page of the report using the scroll bar on the right side of the window.

If your report includes multiple pages, you have two options for navigating through them:

1. Using the grey left and right arrows at the top of the report will take you through the report one page at a time.
2. You can go directly to a specific page of the report by clicking on the drop down arrow and selecting the desired page number.



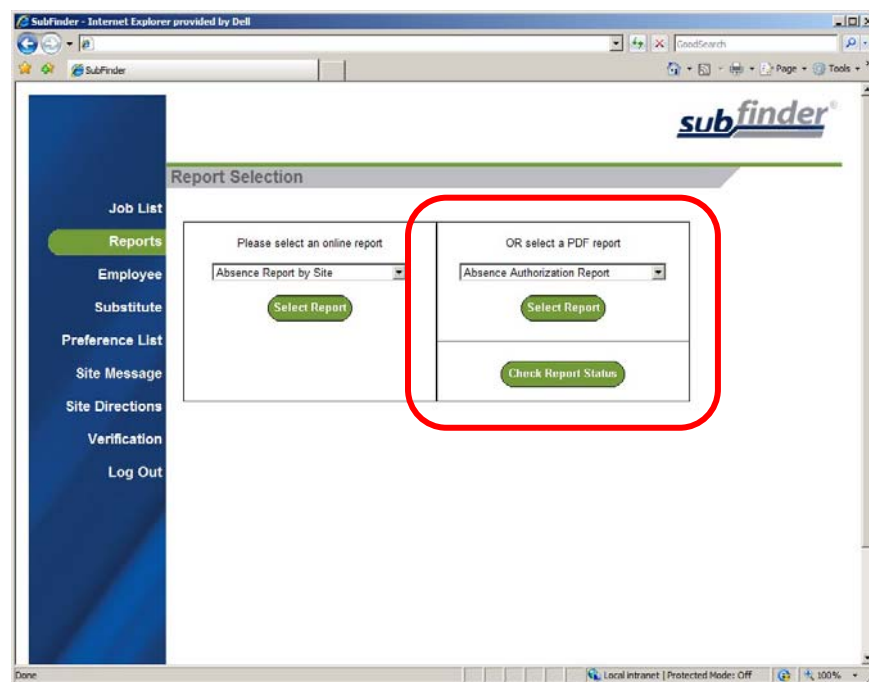
You also have the option to save the report to your computer as a PDF or Word document. By doing so, you will be able to print, email, or review them at your convenience. To save the document, simply click on the Adobe® or Microsoft Word® icon, and save the file to the location of your choice. Please note you must have Adobe Acrobat Reader 4.0 or higher installed on your computer in order to use the Adobe feature.



You may also print the report by using your browser's print function.

PDF Reports

If your district has elected to provide access to the PDF Reports option, the indicated section will appear on your screen:



Using the drop down arrow, select the report you would like to run. You can select from the following reports:

- **Absence Authorization Report:** This report provides all of an employee's absences for the specified time period along with the reason and length of each absence. It includes a space for the Employee and Principal to sign off.
- **Absence Days Report:** This report provides a listing of any employees who have been absent "X" number of days or more during a specified date range.

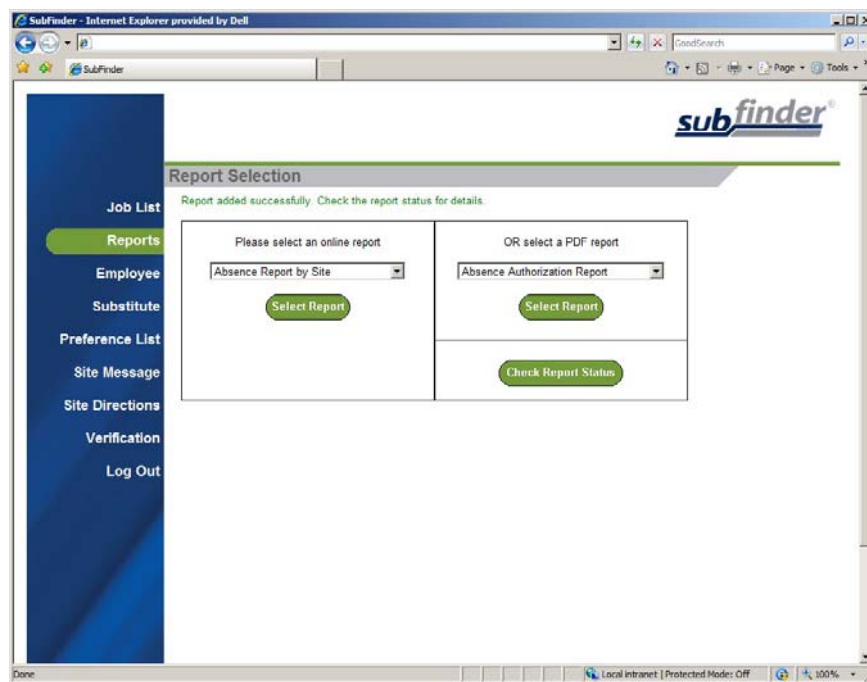
- **Absence Report by Employee:** This report provides absence information sorted by employee and then absence start date.
- **Absence Report by Site:** This report provides absence information sorted by site and then by start date. While this report will include itinerant absences, they will only be displayed for the employee's home site, unless "Include Itinerant Jobs" has been selected in the filter criteria.
- **Absence Report by Site (Itinerant):** This report provides absence information sorted by site and then by absence start date. It includes complete itinerant absence information.
- **Absence Report by Site by Employee:** This report provides absence information sorted by site, then by employee name.
- **Absence Report Francis Howell (line):** This report provides a summary of absences by site, sorted by employee name, absence reason, and miscellaneous code. The report is printed in a "single line per entry" format.
- **Absence Summary:** This report counts and summarizes the number of employee absences based on the following job types: substitute required and no substitute required.
- **All Substitute Listing:** This report provides an alphabetical listing of all Substitutes, their ID number, and their phone number. You can filter this report based on their certified/classified status as well.
- **Employee Absence Analysis:** This report provides a summary of employee absences by reason and day of week. Percentages can be included for each day of the week and for each reason.
- **Employee ID:** This report includes a listing of employee names and their SubFinder-assigned ID number. Administrators will use the ID number any time they need to create an absence for one of their own employees via the phone.
- **Employee Leave Control:** This report provides a detailed accounting of employees within your site who have been set up to utilize SubFinder's Leave Control feature. Selection criterion includes single employee, all employees, all employees by site, all employees at a single site, and all employees within a single site group. You may also choose to include all controlled reasons or a single reason.
- **Employees by Primary Job Position:** This report provides an alphabetical listing of job positions along with the employees who have had the position assigned as their primary position. If the employee has a secondary job position, it will also be included in the report.
- **Individual Substitute Jobs:** This report provides job information sorted by substitute and then by job start date. A separate page is generated for each substitute.
- **Individual Substitute Jobs (line):** This report provides job information sorted by substitute and then by start date. The report will run as a continuous report, with only a new header for each new substitute. It includes less detailed information than the Individual Substitute Jobs report and is printed in a "single line per entry" format.
- **Job Log:** This report provides a detailed account of the actions taken to fill an absence or job. It includes any changes made to the absence or job as well as the steps SubFinder took to fill it. This report can only be created for one job at a time. Please have the job ID number available to enter as filter criteria.
- **Overall Absence Analysis:** This report provides the absences for ALL sites assigned to the user or a SINGLE site assigned to the user, calculating the percentage of absences by day and by reason.
- **Overall Substitute Jobs:** This report provides job information sorted by substitute and then by job start date.

- **Overall Substitute Jobs (line):** This report provides job information sorted by substitute and then by start date. This report will be continuous rather than using a separate page for each substitute. It will include less detailed information than the Overall Substitute Jobs report and will be printed in a “single line per entry” format.
- **Overall Substitute Responses:** This report provides a summary of a substitute's activities with regard to both job shopping and calls received from SubFinder for a specified date range.
- **Preference List for Employees:** This report provides an alphabetical listing of employees at a site along with their preference list assignments.
- **Preference List for Substitutes:** This report generates a listing of preference lists at a site and the substitutes who have been assigned to those lists. You have the option of showing all preference lists or choosing only certain types – personal exclusion, site exclusion, personal permanent substitute, site permanent substitute, or regular.
- **Substitute by Site:** This report provides an alphabetical listing of all substitutes who will work at a particular site. You can also request only those substitutes which are available to work on a specified date or date range.
- **Substitute Certifications:** This report provides an alphabetical listing of all substitutes, indicating their certifications and associated expiration dates. This report can also be used to find out whose certifications are about to expire.
- **Verification – Absence Report by Site:** This report provides absence information sorted by site and then start date. While this report will include itinerant absences, they will only be displayed for the employee's home site. In addition to the filters available on the standard Absence Report by Site, this report also allows filtering by verify status and process status. Note: This report should only be used if your district is using SubFinder's Verification function.
- **Verification – Overall Substitute Jobs:** This report provides job information sorted by substitute and then start date. It will be continuous rather than using a separate page for each substitute. In addition to the filters available on the standard Overall Substitute Jobs report, this report also allows filtering by verify status and process status. Note: This report should only be used if your district is using SubFinder's Verification function.

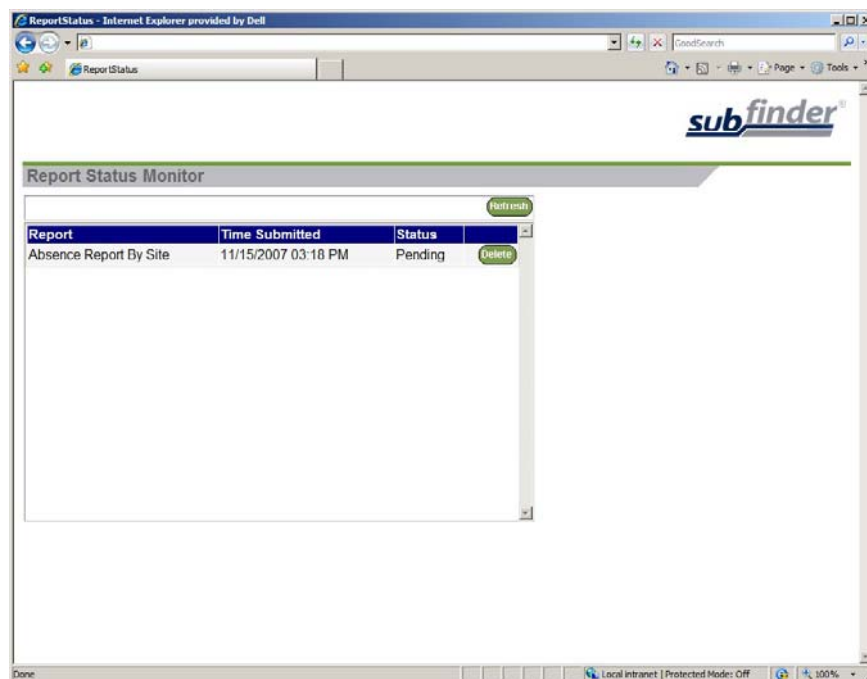
After choosing the desired report, click **Select Report**.

After selecting a report, you will typically be presented with a report criteria screen. Use this screen to filter the report according to your specific needs. Most reports offer a variety of filters. If you do not want to filter the information included in the report, simply leave the boxes unchecked.

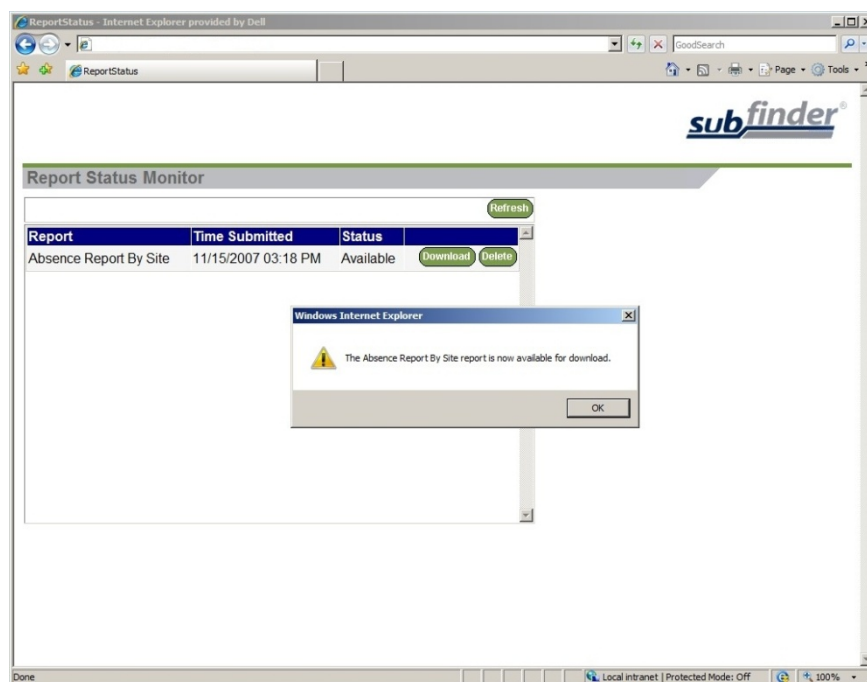
Select the filter(s) and options you wish to use to generate the report and then click **Generate Report**. You will be returned to Report Selection screen where you will see a confirmation that your report request was successfully added.



To review the status of your request, click on **Check Report Status**; a new browser window will appear with the Report Status Monitor.

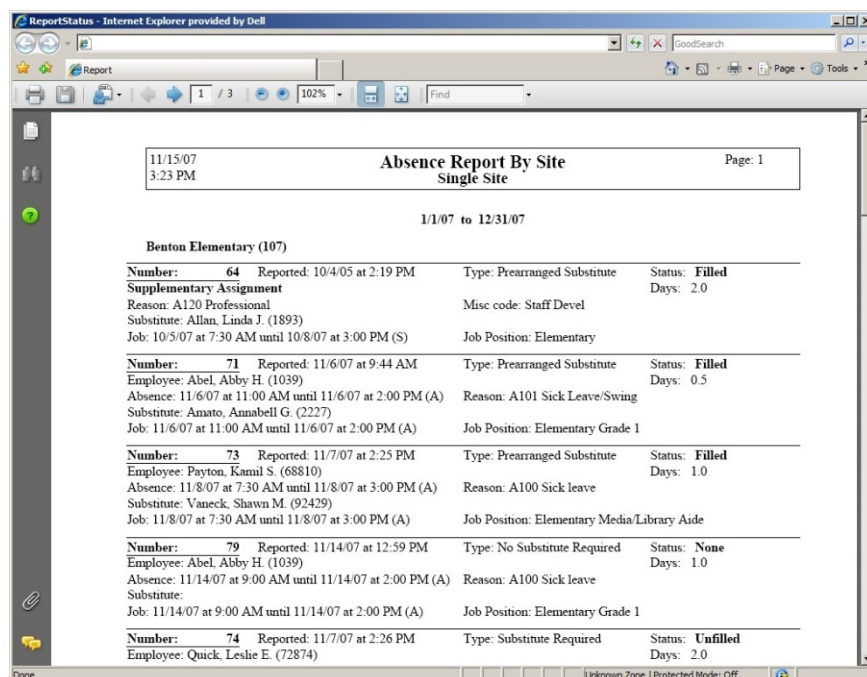



The monitor screen will retain a listing of the reports you request throughout the day. This monitor screen will include pertinent information regarding your requested reports including: the report name, the date and time the request was submitted, and the report status. The status area will either display “Pending” or “Available”. A pending status indicates that the report is still generating and is not ready to download. An available status indicates that the report is ready to download. Once your report is available, an alert will appear notifying you that the report is ready to download.



Click **OK** and the Report Status Monitor Screen will allow you to download the report.


To download the report, click **Download** located next to the report you wish to view. The report will be downloaded as an Adobe file that you can save to your computer or print. Use the various icons on the Adobe Viewer toolbar to print, save, and navigate through the report.



Once you are finished with the report, you can close it using the  button in the top right hand corner of the screen. This will return you to the Report Status Monitor screen.

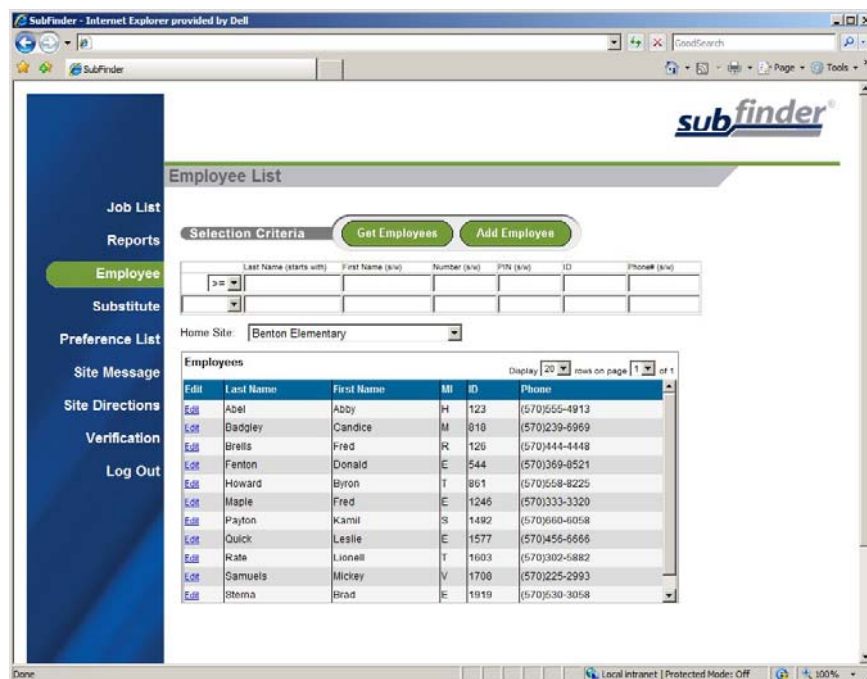
If you do not want the report to be available for review at a later time, click **Delete**; the report will be removed from your list.












Refresh can be used to update the Report Status Monitor screen at any time. This may be useful if you have requested a report and the status of the report is still listed as pending after a period of time.

When you are done with the Report Status Monitor window, close it using the  button in the top right hand corner of the screen.

Employees

This area is used to access information for employees within your site or site group. Click on **Employee** and the following page will be displayed:



Edit	Last Name	First Name	MI	ID	Phone
	Abel	Abby	H	123	(570)555-4913
	Badgley	Candice	M	010	(570)239-6969
	Brellis	Fred	R	126	(570)444-4448
	Fenton	Donald	E	544	(570)369-8521
	Howard	Byron	T	861	(570)558-8225
	Maple	Fred	E	1246	(570)333-3320
	Payton	Kamil	S	1492	(570)660-6058
	Quick	Leslie	E	1577	(570)456-6666
	Rate	Lionell	T	1603	(570)302-5882
	Samuels	Mickey	V	1708	(570)225-2993
	Sterna	Brad	E	1919	(570)530-3058

The Employee List screen contains the following components and buttons:

- Get Employees:** By clicking this, a list of employees that match the criteria provided in the Selection Criteria section will be retrieved from the database. If no criterion is provided, all employees at the site will be listed in alphabetical order according to their last names. By using one or more of the filtering options, you can narrow your search. The filtering options include Last Name, First Name, Employee Number, PIN Number, ID Number, and Phone Number.

Note: In the name field, you can enter the first letter or first few letters of the employee's name to narrow the search rather than enter the employee's entire name.

- Selection Criteria Options:** The drop down boxes located to the left of the search criteria fields are used to further limit your search. The top drop down box contains two options, = and >=.

Selecting >= will limit your search to finding all employees with a name, identifying number, or phone number greater than or equal to that entered in the search field. Using = in a search will provide you with all of the employees with a name, identifying number, or phone number equal to that which was entered in the selection criteria.

The lower drop box contains one option, **AND <=**.

When used in conjunction with the first drop box, AND <= can be used to limit the search to find all employees that are between two qualifying pieces of data. For example, if you wanted to pull up only those employees that have a last name beginning with the letter H through P, you would select the >= option and enter the letter H in the Last Name field. You would then select AND <=, and enter the letter Q in the lower Last Name field.

Once you have entered the desired Selection Criteria, click **Get Employees**. SubFinder will display the matching results in the Employee List box at the bottom of the screen.

- **Add Employee:** By clicking this, you can enter the information necessary for adding a new employee.
- **Home Site:** If you are a site administrator for a single site, your site will automatically be displayed in this field. If you are a site group administrator, you can use the drop down arrow at the end of the field to select the appropriate site.
- **Employees List Box:** This is the area that displays the names of the employees based on the selection criteria. You can change the number of employees displayed on each page and which page of the list you would like to view by using the drop down arrows in the upper right corner of the employee list box.

Adding an Employee

To add an employee, click **Add Employee**. If you have been granted permission to add employee records, the following screen will appear:

Enter the new employee's Last Name, First Name, Middle Initial (MI), Employee Number and PIN. Select the employee's Home Site, the Calendar Track the employee will follow, Primary Job Position, and Secondary Job Position (if applicable). If you wish to assign the Skills List to this employee, check the box beside the **Assign Skills List** field. If a preference list or the skills list is not assigned to the employee, SubFinder will not be able to fill an absence for the employee.

NOTE: If you are adding an employee who is already entered in the SubFinder system as a substitute, simply enter the substitute's Employee Number in the area below the heading **Add**

Employee Status to Existing Sub. Once the number is entered, click on **Add Status**. This will create a record with the name and address fields already completed.

Once you have entered all of the required information, click **Save**. The General Info tab will appear.

The General Info Tab

The screenshot shows the Subfinder web application in Internet Explorer. The left sidebar contains a menu with options: Job List, Reports, Employee (highlighted), Substitute, Preference List, Site Message, Site Directions, Verification, and Log Out. The main content area is titled 'Employee List' and has tabs for User Defined, Certification, Leave Control, Change Loc, General Info (selected), Name/Addr, Schedule, and Minicant Sched. Below the tabs is a table with columns: Last Name, First Name, MI, Number, PIN, ID, Emp, Sub, and Notice. The first row shows 'Roland, James' with MI 'K', Number '5895487', PIN '5895487', ID '4293', and checkboxes for 'Emp' and 'Sub'. Below the table is the 'EMPLOYEE GENERAL INFO' section with a note: 'Note: Leaving this tab without saving will cause your changes to be lost.' The form includes fields for Home Site (Benton Elementary), Hire Date (11/15/2007), Date Added (11/15/2007), Calendar Track (Standard), Start Work (07:30 AM), End Work (03:00 PM), Primary Job Position (Elementary Grade 3), and Secondary Job Position. There are also checkboxes for Make-Up Teacher, Certified, Restricted, Classified, and Inactive. A green 'Save' button is located at the bottom right of the form.

The following fields appear on the employee's General Info tab:

- **Status Box:** This field will show you the Employee's Name, Employee Number, PIN, ID Number, if they are a substitute as well as an employee, and notice of expired certifications. This box will remain present as you navigate from tab to tab.

NOTE: If you are adding a new employee or editing an existing one, the status box will also display notification of successful updates after clicking **Save**. *Failure to Click **Save** after the entry of any new or modified information will result in the loss of all changes.*

S	Last Name	First Name	MI	Number	PIN	ID	Emp	Sub	Notice
T	Adams	Lori	B	561891	296549	4089	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
A	Update successful.								
U									
S									

- **Home Site:** If you are an administrator for a single site, this field will automatically populate with the correct information. If you are a site group administrator, you can click on the arrow at the end of the field and select the appropriate site from the list presented.
- **Calendar Track:** Click on the arrow at the end of the field and select the appropriate calendar track from the list provided.
- **Primary Job Position:** The Primary Job Position is one factor that can be used to match the employee, when absent, to an appropriate substitute. Click on the arrow at the end of the field and select the appropriate primary job position from the list provided.

- **Secondary Job Position:** To select a specific position, click on the arrow at the end of the Secondary Job Position field and select it from the list presented. SubFinder will use this secondary position in the following ways:
 - Any substitute being offered a job for this employee will hear both job positions.
 - If SubFinder can't find a substitute for the Primary Job Position, and there is still time available on the morning of the absence *before* the job is scheduled to change to Failed to Fill, SubFinder will process the Skill List again based on the Secondary Job Position.

NOTE: Home Site, Calendar Track, Primary Job Position, and Secondary Job Position will automatically populate with the information that you entered in the initial Add Employee screen.

- **Hire Date:** What date was this employee hired by your district? Dates should be entered using the format MMDDYY. For example: January 11, 2008 would be entered 011108. Using this format, the slashes (/) will be entered automatically when you tab out of the field. You can also click on the Calendar icon to the right of this field and a calendar will appear which defaults to the current month and year. You can select the correct month, day and year from this calendar.
- **Date Added:** This is the date on which the employee was entered into SubFinder. This field will automatically be completed with the current date and is not available for editing.
- **Work Hours – Start and End:** If the employee's normal working hours are the same as the open and close times at the employee's home site, leave these fields blank. If this employee has working hours that differ from the open and close times for the site, enter them using the format HHMM A/P; for 7:30 a.m. you would type 0730A. Using this format, the colon (:) will be entered automatically when you tab out of the field.
- **Make-up Teacher:** If this employee will serve as a make-up teacher, working during an off-track period, place a check in this box. This field is used for reporting purposes only.
- **Certified:** If this employee is considered certified, a third grade teacher for example, place a check in this box.
- **Classified:** If this employee is considered classified, a food service worker for example, place a check in this box.
- **Restricted:** Flagging the employee record as restricted will prohibit the employee from reporting any absences to SubFinder.
- **Inactive:** Flagging the employee record as inactive will also prohibit the employee from reporting any absences to SubFinder. It also marks the record for deletion the next time the employee purge is run.

Once you have filled in the appropriate information, click **Save**. The information you entered will be saved and you can move to the next tab to enter additional employee information.

NOTE: If you fail to click **Save** before moving to another tab, the information you entered will be lost.

The Name/Address Tab

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Employee List

User Defined Certification Leave Control Change Log

General Info Name/Address Schedule Minorant Schd Main List

S	Last Name	First Name	MI	Number	PIN	ID	Emp	Sub	Notice
T	Roland	James	K	5895467	5895467	4093	PT		
A									
T									
U									
S									

EMPLOYEE ADDRESS

Note: Leaving this tab without saving will cause your changes to be lost

Last Name First Name MI Number PIN Save

Roland James K 5895467 5895467

Street Phone

City State Zip Code

Gender Ethnicity

The **Last Name**, **First Name**, **MI**, **Number**, and **PIN** fields will automatically populate with the information you previously entered for this employee. If any adjustments are needed to these fields, they can be made here. This tab also allows you to enter the employee's address, phone number, gender, and ethnicity.

Once you have filled in the appropriate information, click **Save**. The information you entered will be saved and you can move to the next tab to enter additional employee information.

The Schedule Tab

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Employee List

User Defined Certification Leave Control Change Log

General Info Name/Address Schedule Minorant Schd Main List

S	Last Name	First Name	MI	Number	PIN	ID	Emp	Sub	Notice
T	Roland	James	K	5895467	5895467	4093	PT		
A									
T									
U									
S									

EMPLOYEE SCHEDULE

November 2007

Sun	Mon	Tue	Wed	Thu	Fri	Sat
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

December 2007

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

Color Key:

- Cursor
- Absent
- Sick

The Schedule tab displays the employee's schedule, color-coded as follows:

- **White:** A normal workday for the employee.
- **Yellow:** An absence day for the employee.
- **Red:** A scheduled day off for the employee, such as a weekend or holiday. The days off are based on the Calendar Track assigned to the employee on the General Information tab.

The screen will display two months at a time. To view previous or future months, click the arrows in the upper left or right corners of the calendars. If you click on a day that is marked as an employee absence, a grid will appear below the calendar displaying the reason for the absence along with the start and end dates and times of the absence.

The Itinerant Schedule Tab

The screenshot shows the SubFinder web application interface. On the left is a blue sidebar with navigation links: Job List, Reports, Employee (highlighted), Substitute, Preference List, Site Message, Site Directions, Verification, and Log Out. The main content area is titled 'Employee List' and shows a table with columns: Last Name, First Name, MI, Number, PIN, ID, Emp, Sub, and Notice. The first row lists 'Roland, James' with MI 'K', Number '5895487', PIN '5895487', ID '4093', and Emp 'PT'. Below this is the 'ITINERANT SCHEDULE' section. It includes a note: 'Note: Leaving this tab without saving will cause your changes to be lost.' and a green 'Save' button. There are two tables. The first table has columns: Day, Start Time, End Time, Site, and Add. It shows 'Sunday' with a dropdown arrow, empty fields for Start Time, End Time, and Site, and an 'Add' checkbox. The second table has columns: Day, Start Time, End Time, Site, and Delete. It lists the days of the week with their respective start and end times and sites: Monday (8:15 AM to 3:15 PM, Benton Elementary), Tuesday (8:15 AM to 3:15 PM, Fairview Elementary), Wednesday (8:15 AM to 3:15 PM, Benton Elementary), Thursday (8:15 AM to 3:15 PM, Fairview Elementary), and Friday (8:15 AM to 3:15 PM, Benton Elementary). Each row has a 'Delete' checkbox.

If this employee is an itinerant employee, one who travels from site to site, you will want to record his/her schedule in SubFinder. SubFinder will use the schedule to determine which administrators should hear or see the employee's absence on any given day.

To add a schedule item for an itinerant employee:

1. Select the appropriate day of the week from the list presented by the drop down arrow to the right of the field.
2. Enter the start and end times that the employee works at this particular site.
3. Select the appropriate site from the list presented by the drop down arrow to the right of the field.
4. Place a check in the **Add** box.
5. Click on **Save**. The item you just entered will be saved and will now be displayed on the screen.
6. Repeat steps 1-5 until you have entered the employee's schedule for the entire week. Be sure to include those portions of the schedule that occur at the employee's assigned home site.

7. Additional functions allowed:

- a. You can change any of the information displayed on the itinerant schedule. Simply use the drop down arrows to select a different day of the week or site, or change the start and end times by highlighting the current entry and input the appropriate time. Click **Save**.
- b. You can delete an entry if it was entered incorrectly or if it is no longer needed. Simply check the **Delete** box next to the entry and click **Save**.

NOTE: The entry of the itinerant schedule will not serve as notification to a substitute accepting a job for the employee. The substitute must be notified of the employee's schedule through the use of the special instructions or the itinerant schedule voicing option.

User Defined Codes Tab

The screenshot shows the SubFinder web application interface. On the left is a navigation menu with options: Job List, Reports, Employee (highlighted), Substitute, Preference List, Site Message, Site Directions, Verification, and Log Out. The main content area is titled 'Employee List' and shows a table with columns: Last Name, First Name, ID Number, PIN, ID, Emp, Sub, and Notice. The first row contains the data: Roland, James, K 5895487, 5895487, 4093, and checkboxes for Emp and Sub. Below the table is the 'USER DEFINED CODES' section. It contains a note: 'Note: Leaving this tab without saving will cause your changes to be lost'. There is a 'Save' button. The section includes input fields for: Work Program, SIN, Personal Budget Code, User Defined Code 7, FTE, Payroll Code 1, User Defined Code 4, Payroll Code 2, Termination Date, and User Defined Code 10.

The User Defined Codes tab allows you to keep track of up to 10 additional pieces of data pertaining to the employee.

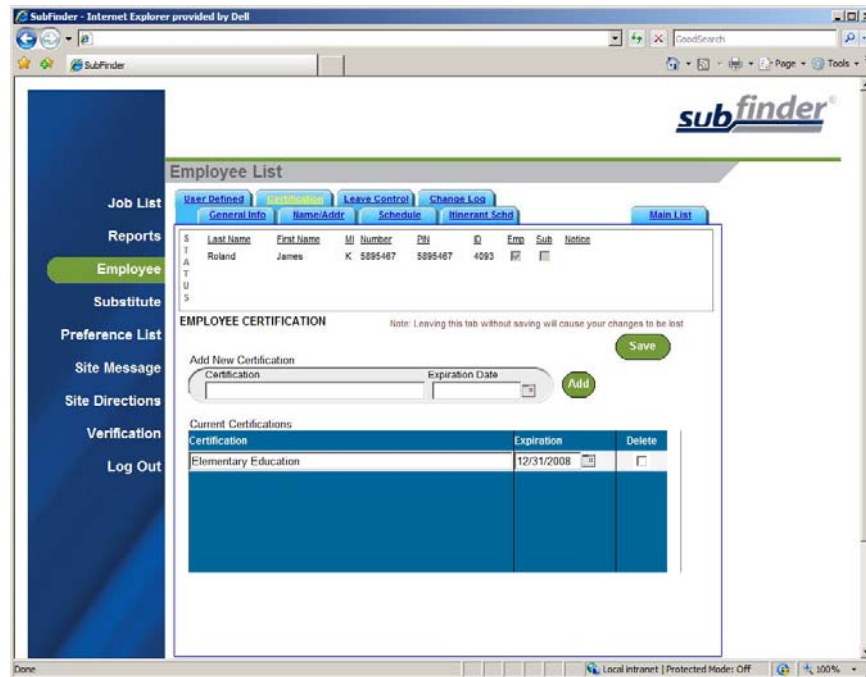
The various codes available have different character lengths:

- | | |
|--------------------------|-----------------------------------|
| User Defined Codes 1-2: | up to 32 alpha/numeric characters |
| User Defined Codes 3-5: | up to 10 alpha/numeric characters |
| User Defined Codes 6-10: | up to 6 alpha/numeric characters |

Your SubFinder Operator will notify you of any User Defined Codes being used.

Once you have entered the employee's User Defined Codes, click **Save**.

The Certification Tab



You can use the Certification tab to enter up to eight different certifications that the employee holds, along with an expiration date for each one.

To add a certification for an employee:

1. Enter the certification name and expiration date in the appropriate fields.
2. Click on **Add** and the certification information will be placed in the Current Certifications Box.
3. Repeat steps 1 and 2 until all certifications have been entered.
4. Once you have added all of the certifications, click on **Save**.
5. Additional functions allowed:
 - a. You can change any of the information displayed for the certification. Simply highlight the certification name or expiration date and enter the updated information. Click **Save**.
 - b. You can delete an entry if it was entered incorrectly or if it is no longer needed. Simply check the **Delete** box next to the entry and click **Save**.

If the employee has a **certification** that is expired, a **notice** will appear on the right hand side of the status bar alerting you of **the expiration**. This notification will **be present** upon entry into the employee's record. You can simply click on the Certification Tab to view which certification has expired.

S	Last Name	First Name	MI	Number	PIN	ID	Emp	Sub	Notice
T	Roland	James	K	5895467	5895467	4093	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Certification expired.
A									
T									
U									
S									

NOTE: The employee will be alerted of a pending or existing expiration when they attempt to contact SubFinder to report an absence. SubFinder will not generate a separate call to notify them of this information.

The Leave Control Tab

SubFinder's Leave Control is a powerful tool that allows your district to track employee leave and entitlements. This tool provides the following features:

- Leave can be calculated in units of either hours or days.
- Each controlled leave reason can have a unique limit.
- You have the ability to view both Leave Used and Leave Available.
- Leave can be accrued at the intervals you require – monthly, quarterly, annually, etc.
- You can roll unused leave over to the same reason or to a different reason.

To apply controls to a particular reason:

1. Select the desired reason(s) in the Available Reasons list on the left side of the Leave Control tab by checking the box under Select.
2. Click >> to transfer the reason(s) to the Assigned Reasons list on the right side of the Leave Control tab. Click **Save**.

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Employee List

User Defined Certification **Leave Control** Change Log Main List

General Info Name/Addr Schedule Minicant Schd

Last Name	First Name	ID Number	DN	ID	Emp	Sub	Notice
Roland	James	K 5895487	5895487	4293	M		M

EMPLOYEE LEAVE CONTROL

Note: Leaving this tab without saving will cause your changes to be lost

Save

Available Reasons

Select	Reason
<input type="checkbox"/>	A100 Sick leave
<input type="checkbox"/>	A101 Sick Leave/Shwing
<input type="checkbox"/>	A103 Classified Personal Leave
<input type="checkbox"/>	A104 Personal Admin/Tech/Prof
<input type="checkbox"/>	A115 Bereavement
<input type="checkbox"/>	A116 District Business
<input type="checkbox"/>	A121 Staffings
<input type="checkbox"/>	A125 Jury Duty
<input type="checkbox"/>	A131 Annual Leave
<input type="checkbox"/>	A135 Unpaid Leave
<input type="checkbox"/>	A150 EA-Education Assoc
<input type="checkbox"/>	A155 SPA- Support Person Assoc
<input type="checkbox"/>	A160 Interscholastic

>> <<

Assigned Reasons

Select	Reason	Details
<input type="checkbox"/>	A102 Certified Personal Leave	Details
<input type="checkbox"/>	A120 Professional	Details

Local intranet | Protected Mode: Off | 100%

3. Click on the **Details** hyperlink next to the transferred reason. SubFinder will display the Employee Leave Reason Details screen:

The screenshot shows the SubFinder web application in an Internet Explorer browser. The left sidebar contains a navigation menu with options: Job List, Reports, Employee (highlighted), Substitute, Preference List, Site Message, Site Directions, Verification, and Log Out. The main content area is titled 'Employee List' and includes tabs for User Defined, Certification, Leave Control, Change Log, General Info, Name/Addr, Schedule, Minorant Schd, and Main List. Below these tabs is a table with columns: Last Name, First Name, ID Number, PIN, ID, Emp, Sub, and Notice. The first row shows 'Roland, James' with ID 'K 5895467' and PIN '5895467'. Below the table is the 'EMPLOYEE LEAVE REASON DETAILS' section for 'A102 Certified Personal Leave'. It includes a 'Save' button and a table with columns: Reason, Accrual Type, Use Hours Not Days, List As Selected Reason, Refuse if Limit Reached, and Last Accrual. The 'Reason' field is set to 'A102 Certified Personal Leave', 'Accrual Type' is 'Annual', 'Use Hours Not Days' is unchecked, 'List As Selected Reason' is unchecked, 'Refuse if Limit Reached' is checked, and 'Last Accrual' is '09/14/05'. Below this is another table with columns: Allotment Per Accrual From Period, Last Period, Accumulation Time Used, Time Available, and buttons for 'Override' and 'Calculate'. The values are: Allotment Per Accrual From Period '2.00', Last Period '0.00', Accumulation Time Used '2.00', Time Available '0.00', and '2.00'.

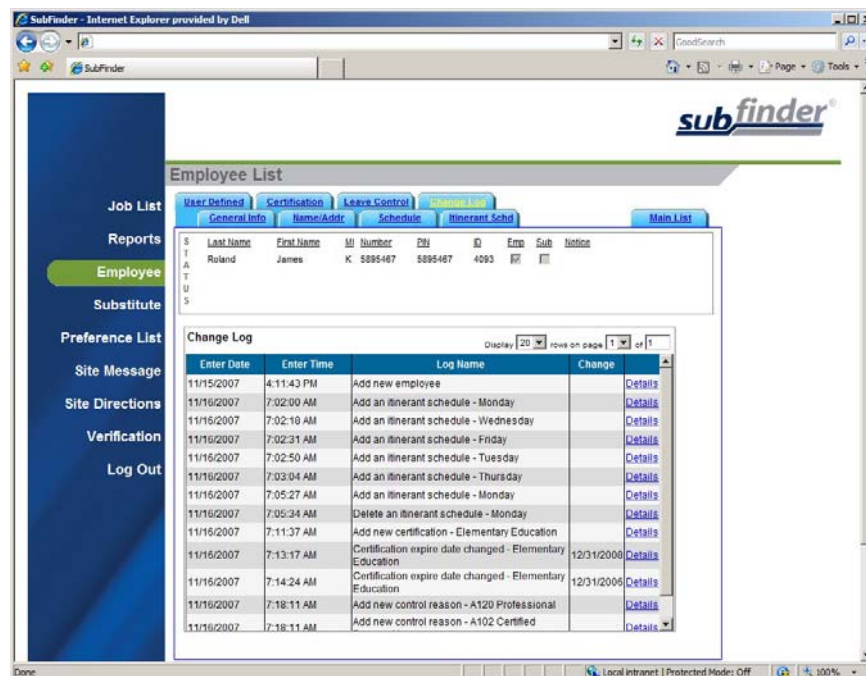
- **Reason:** If the unused balance of leave time for this reason is to be accrued from year to year, what reason should it be accrued to? To select a specific reason, click on the arrow at the end of the Reason field and select the reason from the list presented. The default reason will be the same reason for which you are applying the controls.
- **Accrual Type:** How often will you run an accrual on this reason? The available choices are: Annual, Monthly, Semi-monthly, Bi-weekly, Weekly, and Others.
- **Use Hours Not Days:** What time unit do you want to use to calculate leave for this reason? To select hours, place a check in the box below the heading. To select days, leave the box unchecked.
- **List as Selected Reason:** If this is a reason that accrues from year to year (the unused balance is to be carried over each time a manual accrual is run), check the box below this heading. When this box is checked, any unused balance shown in the Time Available field will be carried over to the reason specified under the Reason heading when a manual accrual is run for the particular Accrual Type.
- **Refuse if Limit Reached:** When the employee has used all the leave time allowed for this reason, should SubFinder refuse to accept any more absences for this reason? If the answer is yes, check the box below the heading. If the box is not checked, SubFinder will allow the employee to continue reporting absences for this reason, even when the limit has been reached.
- **Last Accrual:** This field will display the last date on which an accrual was manually run. If you have not yet run an accrual, this field will indicate when this particular reason was set up. This field is automatically completed by SubFinder and is not available for editing.
- **Allotment per Period:** How much leave time is allotted for this reason during the period specified under Accrual Type? Typically, this will be equal to the amount of leave given for the period. However, if you are setting up leave control mid-year you may need to set this to a smaller amount of time. While this field is typically not available for editing, it can be changed by using **Override**.
- **Accrual from Last Period:** SubFinder will automatically generate how much leave time was carried over from the last accrual period. This number will be generated at the time a manual

accrual is performed. While this field is typically not available for editing, it can be changed by using **Override**.

- **Accumulation:** This is the total of the Allotment per Period and Accrual from the Last Period fields. While this field is typically not available for editing, it can be changed by using **Override**.
- **Time Used:** This field represents that amount of leave time that has been used for this reason since the last manual accrual was run. SubFinder will automatically keep track of this for you as absences for the employee are entered in the system. Please keep in mind that this field will include scheduled absences which have not yet occurred, i.e. future absences. While this field is typically not available for editing, it can be changed by using **Override**.
- **Time Available:** This field represents the amount of leave time still available to the employee for this reason. SubFinder will automatically keep track of this for you as absences for the employee are entered in the system. While this field is typically not available for editing, it can be changed by using **Override**.
- **Override:** **Override** is used to either change the default setting for the above five fields or to establish a value for a field where there is no default. Clicking this will provide you with the edit-access to the above five fields. After clicking **Override**, you may change any of the fields as necessary.
- **Calculate:** **Calculate** is used to recalculate the values in the **Accumulation** and **Time Available** fields whenever a change is made using **Override**. Once you click **Calculate**, the values will be recalculated and the fields will become grayed out again.

Once you have entered all the desired information on the Employee Leave Reason Details tab, click **Save**.

The Change Log Tab



The Change Log tab will show any changes made to the employee record. On the initial Change Log screen you will see a list of all changes made to the particular employee's record, along with some Display options. The Display options will allow you to select how many log entries are displayed on a

page and will give you the ability to jump through the list a page at a time. Simply use the drop down arrows to make your selection.

The information in this screen will include the date on which the change was made, the time at which it was made, the type of change made, and who made the change. To view more specific details on a particular entry, click the **Details** hyperlink at the right of the entry.

The screenshot shows the Subfinder web application in an Internet Explorer browser. The main menu on the left includes Job List, Reports, Employee (highlighted), Substitute, Preference List, Site Message, Site Directions, Verification, and Log Out. The top navigation bar has tabs for User Defined, Certification, Leave Control, and Change Log. The Employee List table shows a single entry for James Roland with ID 4093. The Change Log Details form for this entry shows it was entered on 11/15/2007 at 04:11 PM by user PAM, with the station name WebConnect. The form includes fields for Current and Previous data, and a Close button.

Last Name	First Name	MI	Number	PN	ID	Emp	Sub	Notice
Roland	James	K	5895487	5895487	4093	EE		

CHANGE LOG DETAILS

Person ID: 4093 Entered on: 11/15/2007 at 04:11 PM

Entry: Add new employee

Data:

Current:

Previous:

Station Name: WebConnect

How Entered: Web Connect

User: PAM

Close

The Change Log Details page will give you more specific details on the selected entry. It will include the date and time the change occurred, the type of entry made, the new information, the previous information (if applicable), how the change was entered, and who made the change. When you are finished viewing the information, click **Close** and you will return to the previous page.

The Main List Tab

Clicking on the Main List tab will return you to the Employee List screen.

Edit	Last Name	First Name	MI	ID	Phone
Edit	Abel	Abby	H	123	(570)666-4913
Edit	Badgley	Candice	M	910	(570)239-6969
Edit	Brells	Fred	R	126	(570)444-4448
Edit	Fenton	Donald	E	544	(570)369-8521
Edit	Howard	Byron	T	861	(570)658-8225
Edit	Maple	Fred	E	1246	(570)333-3320
Edit	Payton	Kamali	S	1492	(570)660-6058
Edit	Quick	Leslie	E	1577	(570)456-6666
Edit	Rata	Lionell	T	1603	(570)302-5882
Edit	Roland	James	K	4093	(570)225-2993
Edit	Samuels	Mickey	V	1708	(570)225-2993

Editing an Employee

Once an employee has been added to SubFinder, you may need to make changes to the record. To edit an employee's record, use the selection criteria as described in **Adding an Employee** to locate the employee name and then click on the **Edit** hyperlink to the left of the employee's name. The Edit Employee screen will appear:

Last Name	First Name	MI	Number	PIN	ID	Emp	Sub	Notice
Roland	James	K	5895487	5895487	4093	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

EMPLOYEE GENERAL INFO Note: Leaving this tab without saving will cause your changes to be lost

Home Site: Benton Elementary Hire Date: 11/15/2007 Date Added: 11/15/2007

Calendar Track: Standard Start Work: 07:30 AM End Work: 03:00 PM

Primary Job Position: Elementary Grade 3

Secondary Job Position: ☐ Make Up Teacher ☐ Certified ☐ Restricted ☐ Classified ☐ Inactive

[Save](#)

When you edit an employee record, all fields can be changed as necessary, depending on the rights which you were granted by your SubFinder Operator. Once you have made the desired changes on each tab, click **Save** before moving to another tab. For details on specific fields, please refer to the section titled **Adding an Employee**.

Substitutes

This area is used to access information for substitutes. Click on **Substitute** and the following page will be displayed:

The Substitute List screen contains the following components and buttons:

- Get Substitutes:** By clicking this, a list of substitutes that match the criteria provided in the Selection Criteria section will be retrieved from the database. If no criterion is provided, all substitutes will be listed in alphabetical order according to their last names. By using one or more of the filtering options, you can narrow your search. The filtering options include Last Name, First Name, Number, PIN, ID, and Phone Number.

Note: In the name field, you can enter the first letter or first few letters of the substitute's name to narrow the search rather than enter the substitute's entire name.

- Selection Criteria Options:** The dropdown boxes located to the left of the search criteria fields are used to further limit your search. The top dropdown box contains two options, = and >=.

Selecting >= will limit your search to finding all substitutes with a name, identifying number, or phone number greater than or equal to that entered in the search field. Using = in a search will provide you with all of the substitutes with a name, identifying number, or phone number equal to that which was entered in the selection criteria.

The lower drop box contains one option, **AND <=**.

When used in conjunction with the first drop box, **AND <=** can be used to limit the search to find all substitutes that are between two qualifying pieces of data. For example, if you wanted to pull up only those substitutes that have a last name beginning with the letter H through P, you would select the **>=** option and enter the letter H in the Last Name field. You would then select **AND <=**, and enter the letter Q in the lower Last Name field.

Once you have entered the desired Selection Criteria, click **Get Substitutes**. SubFinder will display the matching results in the Substitute List box at the bottom of the screen.

- **Add Substitute:** By clicking this, you can enter the information necessary for adding a new substitute.
- **Substitutes List Box:** This is the area that displays the names of the substitutes based on the selection criteria. You can change the number of substitutes displayed on each page and which page of the list you would like to view by using the drop down arrows in the upper right corner of the substitute list box.

Adding a Substitute

To add a substitute, click on **Add Substitute**. If you have been granted permission to add substitute records, the following screen will appear:

The screenshot shows the SubFinder web application in an Internet Explorer browser window. The page has a blue sidebar on the left with a menu containing: Job List, Reports, Employee, Substitute (highlighted in green), Preference List, Site Message, Site Directions, Verification, and Log Out. The main content area is titled 'Substitute List' and contains two sections. The first section, 'Add New Sub:', has a 'Save' button and a 'Cancel' button. Below it is a form with five fields: Last Name (containing 'Thomas'), First Name (containing 'Ellen'), MI (containing 'G'), Number (containing '326045'), and PIN (containing '326045'). The second section, 'Add Sub Status To Existing Employee:', has a 'Number' field and an 'Add Status' button. The SubFinder logo is in the top right corner of the main area. The browser's status bar at the bottom shows 'Done', 'Local intranet', 'Protected Mode: Off', and '100%' zoom.

Enter the new Substitute's Last Name, First Name, Middle Initial, Employee Number and PIN.

NOTE: If you are adding a substitute who is already entered in the SubFinder system as an employee, simply enter the employee's Employee Number in the area below the heading **Add Sub Status to Existing Employee**. Once the number is entered, click on **Add Status**. This will create a record with the Name/Address fields already populated.

Once you have entered all of the required information, click **Save**. The General Info tab will appear.

The General Info Tab

The screenshot shows the SubFinder web application in Internet Explorer. The left sidebar contains a menu with options: Job List, Reports, Employee, Substitute (highlighted), Preference List, Site Message, Site Directions, Verification, and Log Out. The main content area is titled 'Substitute List' and has several tabs: Availability, User Defined, Certification, Disqualification, Change Log, General Info (selected), Name/Addr, Schedule, Sites, Positions, and Main List. Below the tabs is a table with columns: Last Name, First Name, MI, Number, PIN, ID, Emp, Sub, and Notice. The table contains one row for 'Thomas, Ellen' with values G, 326845, 326845, 4094, and checkboxes for Emp and Sub. Below the table is the 'SUB GENERAL INFO' section, which includes fields for Max Days To Work, Total Days Worked, Certified Job Days, Max Hours Per Week, Hire Date, and Date Added. There are also checkboxes for Certified, Classified, Preregistered, Restricted, and Inactive, and a dropdown for Home Site Group. A 'Save' button is located at the bottom right of the form.

The following fields appear on the substitute's General Information tab:

- **Status Box:** This field will show you the Substitute's Name, Employee Number, PIN, ID Number, if they are an employee as well as a substitute, and notice of expired certifications. This box will remain present as you navigate from tab to tab.

NOTE: If you are adding a new substitute or editing an existing one, the status box will also display notification of successful updates after clicking **Save**.

The screenshot shows the Status Box with the following information: Last Name: Thomas, First Name: Ellen, MI: G, Number: 326845, PIN: 326845, ID: 4094, Emp: [checkbox], Sub: [checkbox], and Notice: [checkbox]. Below this information is a green message that says 'Update successful.'

- **Max Days to Work:** How many days is the substitute permitted to work during the current reporting period – typically a school year? If there is no limit, leave this field blank. This can be used to prevent retired teachers from working more days than they desire or are allowed.
- **Total Days Worked:** This field is automatically updated by SubFinder and is not available for editing. It displays the total number of days the substitute has been scheduled to work, including past, present, and future jobs, as of the current date.
- **Certified Job Days:** This field is automatically updated by SubFinder and is not available for editing. It displays the total number of days the substitute has worked in job positions designated as “certified”.
- **Max Hours per Week:** How many hours is the substitute permitted to work during any given week? This may be used for a substitute who has been newly hired and is still in a “probationary” period, or for a substitute who wants to work no more than a certain number of hours per week. If there is no limit, leave this field blank.
- **Hire Date:** What date was this substitute hired by your district? Dates should be entered using the format MMDDYY. For example: January 11, 2008 would be entered 011108. Using this format, the slashes (/) will be entered automatically when you tab out of the field. You can

also click on the Calendar icon to the right of this field. A calendar will appear which defaults to the current month, day and year. You can select the correct month, day and year from this calendar.

- **Date Added:** This field is automatically completed by SubFinder and is not available for editing. It reflects the date on which the record was added into the system.
- **Certified:** Is this substitute qualified to work certified positions, a third grade teacher for example, within your district?
- **Classified:** Is this substitute qualified to work classified positions, a food service worker for example, within your district?
- **Pre-registered:** If the pre-registration feature has been enabled, this field will indicate whether or not the substitute has called into SubFinder and indicated his or her availability. As an administrator, you can manually flag (or un-flag) this field. If you are using the pre-registration feature, and adding a new substitute after the pre-registration period has ended, you must manually flag the person as pre-registered before they will receive calls from SubFinder.
- **Restricted:** Flagging a substitute as restricted tells SubFinder not to offer any jobs to the substitute. The substitute will not be considered until the restriction is removed.
- **Inactive:** Flagging a substitute as inactive restricts the substitute from working and marks him/her for deletion the next time the substitute purge is run.
- **Home Site Group:** This field can be used to tie a substitute to a particular site for reporting purposes. It will not be used to limit the substitute to working only at the selected site. If the substitute serves as both an employee and a substitute within the district, this field will reflect their home site from the employee record. Typically this field will be left blank.

Once you have entered in the appropriate information, click **Save**. The information you entered will be saved and you can move to the next tab to enter additional substitute information.

NOTE: If you fail to click **Save** before moving to another tab, the information you entered will be lost.

The Name and Address Tab

The screenshot shows the SubFinder web application interface. On the left is a navigation menu with options: Job List, Reports, Employee, Substitute (highlighted), Preference List, Site Message, Site Directions, Verification, and Log Out. The main content area is titled 'Substitute List' and contains a table with columns: Last Name, First Name, ID Number, PIN, Emp, Sub, and Notice. The table lists one substitute: Thomas, Ellen, G, 326845, 326845, 4094, and a status icon. Below the table is the 'SUB ADDRESS' form with fields for Last Name, First Name, ID Number, PIN, Street, City, State, Zip, Phone, Gender, and Ethnicity. A 'Save' button is located next to the form. A note at the top of the form states: 'Note: Leaving this tab without saving will cause your changes to be lost.' The browser window title is 'SubFinder - Internet Explorer provided by Dell'.

Last Name	First Name	ID Number	PIN	Emp	Sub	Notice
Thomas	Ellen	G	326845	326845	4094	

SUB ADDRESS

Last Name: Thomas First Name: Ellen ID Number: G PIN: 326845 Emp: 326845

Street: Phone:

City: State: Zip:

Gender: Ethnicity:

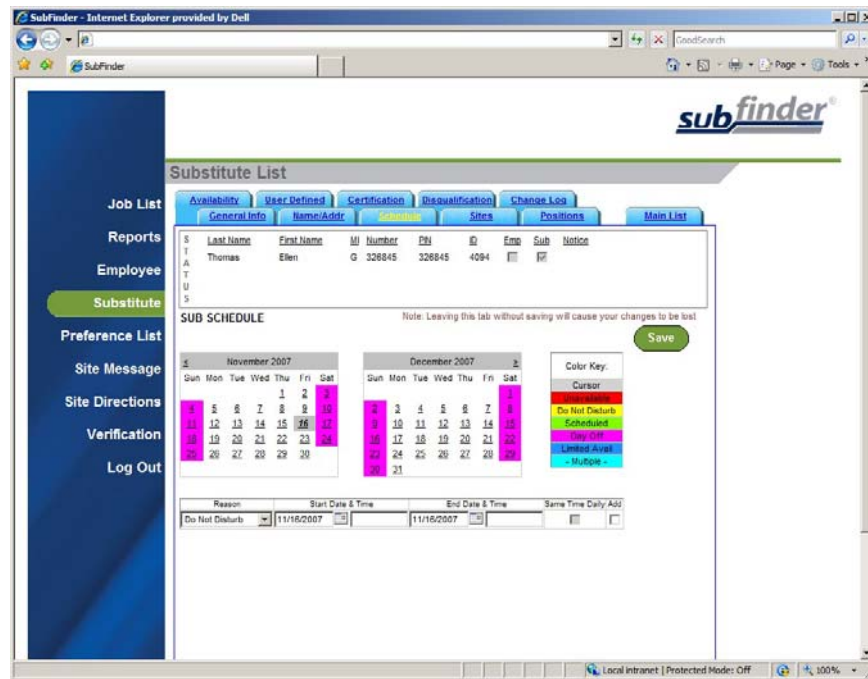
Save

Note: Leaving this tab without saving will cause your changes to be lost.

The **Last Name**, **First Name**, **MI**, **Number**, and **PIN** fields will automatically populate with the information you have previously entered for this substitute. If any changes need to be made to these fields, they can be made here. This tab also allows you to enter the substitute's address, phone number, gender, and ethnicity.

Once you have filled in the appropriate information, click **Save**. The information you entered will be saved and you can move to the next tab to enter additional substitute information.

The Schedule Tab



The Schedule tab displays the substitute's schedule, color-coded as follows:

- **Black:** The substitute is available to work at least 8 hours on the indicated day.
- **Red:** The substitute has indicated he/she is unavailable to work on the indicated day(s). Unavailable means that SubFinder will not offer the substitute jobs on that day or during the specified date range. It does not mean that the substitute is not taking calls for future dates. SubFinder may still call the substitute during the evening callout period to offer work for a future date.
- **Yellow:** The substitute has requested a "Do Not Disturb" for at least a portion of the indicated day. A Do Not Disturb means that SubFinder will not call the substitute to offer them jobs on the day or during the date range that has been entered. It does not mean that the substitute is unavailable to work. The substitute can still contact SubFinder to shop for jobs if your district allows this option. SubFinder could also call them, prior to the Do Not Disturb, and offer them work for the selected day or date range.
- **Green:** The substitute is scheduled to work for at least a portion of the indicated day.
- **Pink:** The substitute has indicated that this day will always be a day off.
- **Blue:** The substitute has limited availability on the indicated day – he/she can work a portion of the day, but less than 8 hours total.

- **Aqua:** The substitute has more than one status on this day. For example, there is an Unavailable and also a Do Not Disturb scheduled for the day.

This screen will show a two-month schedule for the substitute that includes the current month and the following month. To move forward or backward one month at a time, click on the arrows located in the top corners of the displayed calendars.

You also have the ability to interact with the substitute's schedule, making changes such as adding an Unavailable or Do Not Disturb date range:

1. Click on the desired date. That date will automatically populate the Start and End dates in the table below the calendars.
2. Use the drop down menu to select the type of record you wish to create.
3. Enter the Start and End times in the boxes provided.
4. If you want to enter a date range that spans more than one day, change the End Date to reflect the last day of the Unavailable or Do Not Disturb.
5. If the Unavailable or Do Not Disturb should follow the same times daily, place a check in the box under the **Same Times Daily** heading (for example, a Do Not Disturb from 6:00 AM to 8:00 AM for each day of a multiple day entry). If it should cover the entire range, leave the box under the **Same Times Daily** heading blank (for example the substitute is unavailable from 6:00 AM on 06/04/07 until 11:30 PM on 06/08/07).
6. Check the box under the **Add** heading and then click **Save**. The change will appear on the calendar display.
7. Repeat steps 1-6 until all entries are made.
8. Additional functions allowed:
 - a. You can edit or delete a record by clicking on a date within the Unavailable or Do Not Disturb. The record will be displayed below the calendar. To edit the record, make any changes as necessary and click **Save**.
 - b. You can delete an entry if it was entered incorrectly or if it is no longer needed. Simply check the **Delete** box next to the entry and click **Save**.

NOTE: You cannot delete an Unavailable or Do Not Disturb that occurs in the past and you will only be able to edit those portions of an Unavailable or Do Not Disturb that are in the future. Any past dates will not be available for editing.

The Sites Tab

The screenshot shows the SubFinder web application interface. On the left is a navigation menu with options: Job List, Reports, Employee, Substitute (highlighted), Preference List, Site Message, Site Directions, Verification, and Log Out. The main content area is titled 'Substitute List' and has several tabs: Availability, User Defined, Certification, Disqualification, Change Log, General Info, Name/Addr, Schedule, Sites (active), Positions, and Main List. Below the tabs, a table shows details for substitute 'T A T U S Thomas Ellen', including ID, Number, PIN, and Fee. The 'SUB SITES' section has a 'Type Of List' dropdown set to 'Will Work Only At These Sites' and a 'Save' button. It contains two tables: 'Available Sites' and 'Assigned Sites'. The 'Available Sites' table lists 14 sites with checkboxes. The 'Assigned Sites' table lists 5 sites with checkboxes. Between the tables are '>>' and '<<' buttons for moving sites.

Select	Site	Site #
<input type="checkbox"/>	*Elementary Group	98
<input type="checkbox"/>	*High School Group	90
<input type="checkbox"/>	Administrative Offices	116
<input type="checkbox"/>	All Sites	87
<input type="checkbox"/>	Andrew Jackson High School	106
<input type="checkbox"/>	Cedar Ridge Middle School	109
<input type="checkbox"/>	East Middle School	105
<input type="checkbox"/>	East River High School	110
<input type="checkbox"/>	Foster Road Elem	93
<input type="checkbox"/>	Foster Road Pre-K	94
<input type="checkbox"/>	Kittap Group	95
<input type="checkbox"/>	Little Bug Preschool	112
<input type="checkbox"/>	Lyndon B. Johnson Middle School	114

Select	Site	Site #
<input type="checkbox"/>	Benton Elementary	107
<input type="checkbox"/>	Blue Ridge Elementary	108
<input type="checkbox"/>	Fairview Elementary	115
<input type="checkbox"/>	George Washington Elementary	111
<input type="checkbox"/>	Mill Creek Elementary	113

The Sites tab tells SubFinder which sites the substitute will or will not work at. By default, any new substitute will be set to **Will Work At All Sites**. If the substitute has some specific site preferences you can change them using the following steps:

1. Click on the drop down arrow at the end of the **Type of List** field. You will be presented with the following list:
 - a. **Will Work At All Sites:** The substitute has no site preferences. He/she is willing to work at any site that needs a substitute. If this option is selected, you will not be able to move sites out of the Available Sites window.
 - b. **Will Work Only At These Sites:** The substitute is only willing to work at certain sites. They will only receive calls for jobs at the sites listed in the Assigned Sites area. If a substitute is placed on a Preference List for a site not listed within the Assigned Sites box, SubFinder will still call them for jobs at that particular site.
 - c. **Will Not Work At These Sites:** The substitute is not willing to work at certain sites. They will never receive a call from a site that is listed in the Assigned Sites area.

Select the desired option from the list.

2. If you choose **Will Work Only at These Sites** or **Will Not Work at These Sites** you must now transfer the appropriate sites from the list of Available Sites to the Assigned Sites list. To transfer sites from the left to the right, simply place checkmarks in the boxes next to the sites you wish to move and click **>>**. Click **Save**.
3. If you wish to remove a site from the Assigned Sites list check the box next to the site and click **<<**. Click **Save**.

The Positions Tab

The screenshot shows the SubFinder web application in an Internet Explorer browser. The 'Substitute List' page is active, displaying a table with columns: Last Name, First Name, ID Number, PIN, ID, Fm, Sub, and Notice. The first row shows 'Thomas, Ellen' with ID 328845 and PIN 328845. Below the table, the 'SUB POSITIONS:' section contains a 'Default Skill Level' dropdown set to 'A' and a 'Save' button. A note states: 'Note: Leaving this tab without saving will cause your changes to be lost.' The page is divided into two main sections: 'Available Positions' and 'Able To Work'. The 'Available Positions' list includes checkboxes for various roles like 'All Job Positions', 'Certified No Sub Required', 'Classified No Sub Required', 'Classified Sub Required', 'Elementary Certified', 'Questar Special Education', 'Secondary Certified', 'Special Education', 'Accounts Payable', 'Assistant Facilities Director', 'Assistant Finance Director', 'Assistant Principal', and 'Assistant Principal Secretary'. The 'Able To Work' list includes checkboxes for 'Elementary', 'Elementary Art', 'Elementary ELL', 'Elementary Gifted & Talented', 'Elementary Grade 1', 'Elementary Grade 2', 'Elementary Grade 3', 'Elementary Grade 4', 'Elementary Grade 5', 'Elementary Media/Library', 'Elementary Music', 'Elementary Physical Education', and 'Elementary Spanish'. Each item in the 'Able To Work' list has a 'Skill Level' dropdown set to 'A'. Navigation buttons '>>' and '<<' are located between the two lists.

The Positions tab is where you tell SubFinder what job positions the substitute is willing/able to fill.

- **Available Positions:** This is a list of all the job positions that are available to be assigned to the substitute.
- **Able to Work:** This is a list of the job positions that the substitute is willing/able to work. If you want this substitute to receive skill list-based job offers, you must assign positions to the substitute.
- **Skill Level:** This shows the skill level associated with each job position assigned to the Able to Work job positions list. Skill levels run from 'A' through 'J' with 'A' being the highest.
- **Default Skill Level:** This is the skill level that will be initially assigned to all positions transferred from the Available Positions list to the Able to Work list. If you want most of the job positions to be assigned at the 'C' level, change this field by highlighting the default 'A' and typing in 'C'. This should be done prior to assigning any positions to the substitute.

To assign positions to a substitute, place checkmarks in the boxes next to the job positions you wish to assign. Click >> to move the positions to the right. If necessary, change the skill level for the transferred positions by highlighting the skill level assigned and typing in the appropriate letter – 'A' is the highest and 'J' is the lowest. When you have finished assigning positions, click **Save**.

To remove a position from the Able to Work list, simply place a checkmark in the box next to the job position and click <<. Click **Save**.

The Availability Tab

The screenshot shows the Subfinder web application in an Internet Explorer browser. The left sidebar contains a menu with options: Job List, Reports, Employee, Substitute (highlighted), Preference List, Site Message, Site Directions, Verification, and Log Out. The main content area is titled 'Substitute List' and has several tabs: Availability (selected), User Defined, Certification, Disqualification, Change Log, General Info, Name/Addr, Schedule, Sites, Positions, and Main List. Below the tabs is a table with columns: Last Name, First Name, ID Number, PIN, ID, Emp, Sub, and Notice. The first row shows 'Thomas, Ellen' with ID Number 'G 328845', PIN '328845', ID '4094', and Emp 'FT'. Below this is the 'SUB AVAILABILITY' section with a note: 'Note: Leaving this tab without saving will cause your changes to be lost'. It contains a table for entering availability by day of the week. The 'Save' button is visible.

	From Time	To Time	Min Hours	Max Hours
Sunday				0
Monday				10
Tuesday				10
Wednesday				10
Thursday				10
Friday				10
Saturday				0

The Availability tab shows the substitute's availability "as a rule" for each day.

By default, a new substitute will be available Monday through Friday for a maximum of 10 hours each day. He/she will be unavailable on Saturday and Sunday.

The availability for any day can be changed by filling in the following fields:

- **From Time:** What is the earliest time that the substitute is available to begin working on the selected day? Enter the time using the format HHMM A/P; for 8:00 a.m. you would type 0800A. Leave this field blank if there is no preference.
- **To Time:** What is the latest time the substitute is available to work until on the selected day? Enter the time using the format HHMM A/P; for 3:30 p.m. you would type 0330P. Leave this field blank if there is no preference.
- **Minimum Hours:** What is the minimum number of hours the substitute is able to work on the selected day? The substitute would never be offered a job on this day that is less than the minimum specified. You may enter a value from 0 to 24. Leave this field blank if there is no preference.
- **Maximum Hours:** What is the maximum number of hours that the substitute is able to work on the selected day? The substitute would never be offered a job on this day that is more than the maximum specified. If the substitute is not available to work on a certain day, enter 0. You may enter a value from 0 to 24. The default for this field is 10.

Once you have entered the substitute's availability for the entire week, click **Save**.

The User Defined Codes Tab

The screenshot shows the SubFinder web application in an Internet Explorer browser. The left sidebar contains a menu with options: Job List, Reports, Employee, Substitute (highlighted), Preference List, Site Message, Site Directions, Verification, and Log Out. The main content area is titled 'Substitute List' and has several tabs: Availability, User Defined (selected), Certification, Disqualification, Change Log, General Info, Name/Addr, Schedule, Sites, Positions, and Main List. Below the tabs is a table with columns: Last Name, First Name, ID Number, PIN, ID, Emp, Sub, and Notice. The table contains one row for 'Thomas, Ellen' with ID 328845, PIN 328845, and ID 4094. Below the table is a section titled 'SUB USER DEFINED CODES' with a note: 'Note: Leaving this tab without saving will cause your changes to be lost'. There is a 'Save' button. The form contains several input fields: University / Degree, Payroll Report Code, Personal Budget Code, Payroll Report Date, User Defined Code 3, User Defined Code 8, User Defined Code 4, CIMS Export Code, Termination Date, and CIMS Job Code.

The User Defined Codes tab allows you to keep track of up to 10 additional pieces of data pertaining to the substitute.

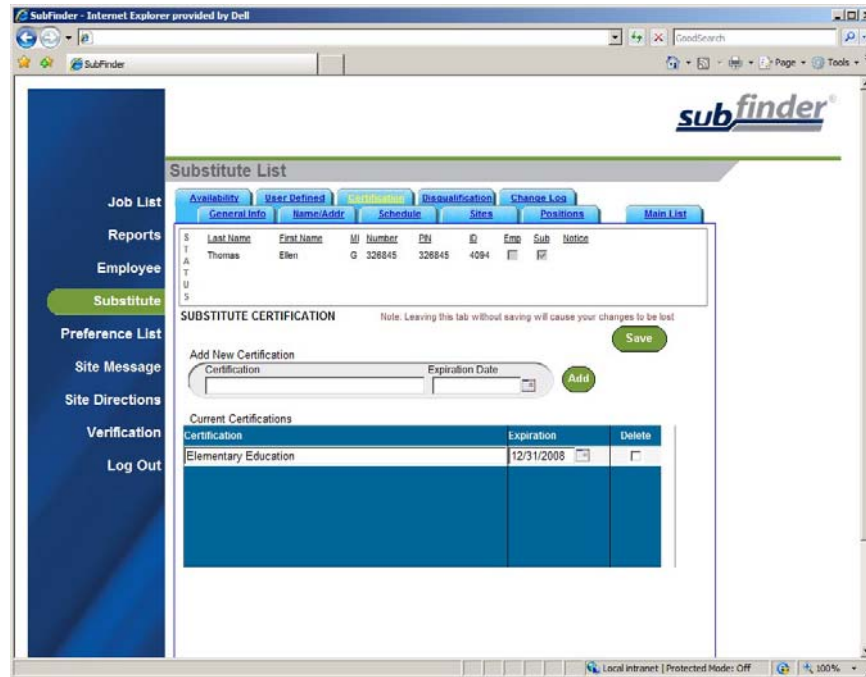
The various codes available have different character lengths:

- User Defined Codes 1-2: up to 32 alpha/numeric characters
- User Defined Codes 3-5: up to 10 alpha/numeric characters
- User Defined Codes 6-10: up to 6 alpha/numeric characters

Your SubFinder Operator will notify you of any User Defined Codes being used.

Once you have entered the substitute's User Defined Codes, click **Save**.

The Certification Tab



You can use the Certification tab to enter up to eight different certifications that the substitute holds, along with an expiration date for each one.

To add a certification for a substitute:

1. Enter the certification name and expiration date in the appropriate fields.
2. Click on **Add** and the certification information will be placed in the Current Certifications Box.
3. Repeat steps 1 and 2 until all certifications have been entered.
4. Once you have added all of the certifications, click on **Save**.
5. Additional functions allowed:
 - a. You can change any of the information displayed for the certification. Simply highlight the certification name or expiration date and enter the updated information. Click **Save**.
 - b. You can delete an entry if it was entered incorrectly or if it is no longer needed. Simply check the **Delete** box next to the entry and click **Save**.

If the substitute has a certification that is expired, a notice will appear on the right hand side of the status bar alerting you of the expiration. This notification will be present upon entry into the substitute's record. You can simply click on the Certification Tab to view which certification has expired.

S	Last Name	First Name	MI	Number	PIN	ID	Emp	Sub	Notice
T	Thomas	Ellen	G	326845	326845	4094	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Certification expired.
A									
T									
U									
S									

NOTE: If a substitute has an expired certification, SubFinder will not offer them any jobs until the date field is changed to a future date. The substitute will be alerted of a pending or existing expiration

when they attempt to contact SubFinder to “job shop”. SubFinder will not generate a separate call to notify them of this information.

The Disqualification Tab

The screenshot shows the SubFinder web application interface. On the left is a blue sidebar with navigation links: Job List, Reports, Employee, **Substitute** (highlighted), Preference List, Site Message, Site Directions, Verification, and Log Out. The main content area is titled 'Substitute List' and features several tabs: Availability, User Defined, Certification, **Disqualification** (selected), Change Log, and Main List. Below these tabs is a table with columns: Last Name, First Name, ID Number, PIN, ID, Emp, Sub, and Notice. The first row shows 'Thomas, Ellen' with ID 326845, PIN 326845, and ID 4094. Below this table is the 'SUB DISQUALIFICATION' section. It includes a 'Reset Count' button and a 'Configuration Profile' dropdown menu set to 'Default'. A table displays disqualification counts and maximums for various events:

	Morning Count	Morning Max	Evening Count	Evening Max
Connect/No-Response	0	5	0	
Rejections	0	2	0	
Cancellations	0	2	0	
NoAnswers	0	3	0	
Busy	0	6	0	
Hangup After PIN Entered	0	3	0	
Operator Interrupts	0	2	0	

If your district has enabled the Substitute Disqualification feature, the Disqualification tab will indicate how many of each of the “disqualifying” events a substitute has accrued during today’s morning and evening calling periods. Each potential disqualifier has four values beside it – **Morning Count**, **Morning Maximum**, **Evening Count** and **Evening Maximum**. The **Count** columns show how many times an event has occurred. The **Maximum** columns show how many times an event is allowed to occur before the substitute will not receive any more calls from SubFinder for that calling period.

Once the value in the count column reaches the value in the Maximum column for any single event, the substitute is disqualified. If you would like to re-qualify the substitute for any reason during the current calling period, simply click **Reset Count**. The values in the Count column will be removed and the substitute will be eligible to receive additional calls from SubFinder. If you do nothing, SubFinder will automatically reset all counts before the next call out period begins.

The values in the Maximum columns are set up within the SubFinder system and cannot be changed on this screen.

If your district has set up different Configuration Profiles in the SubFinder system, you can view the disqualification values for each profile. Simply click on the drop down box at the end of the Configuration Profile field and select the profile you wish to view. The disqualification values for that profile will appear in the table.

The Change Log Tab

The screenshot shows the Subfinder web application interface. On the left is a navigation menu with options: Job List, Reports, Employee, Substitute (highlighted), Preference List, Site Message, Site Directions, Verification, and Log Out. The main content area is titled 'Substitute List' and contains several tabs: Availability, User Defined, Certification, Disqualification, Change Log (selected), Sites, Positions, and Main List. Below the tabs is a table with columns: Last Name, First Name, MI, Number, PIN, ID, Emp, Sub, and Notice. The table contains one entry for Thomas, Ellen. Below this is the 'Change Log' section, which has a display options dropdown set to '20 rows on page 1 of 2'. It contains a table with columns: Enter Date, Enter Time, Log Name, and Change. The table lists 14 entries of changes made to the substitute's record, including adding new substitutes, changing certification, and adding work sites. Each entry has a 'Details' hyperlink on the right.

Enter Date	Enter Time	Log Name	Change
11/1/2004	11:13:32 AM	Add new substitute	Details
11/16/2007	7:58:38 AM	Add new substitute	Details
11/16/2007	8:03:58 AM	Certified changed	Details
11/16/2007	8:23:34 AM	Substitute "will work at" type changed	Details
11/16/2007	8:23:34 AM	Add a substitute work site - Benton Elementary	Details
11/16/2007	8:23:34 AM	Add a substitute work site - Blue Ridge Elementary	Details
11/16/2007	8:23:34 AM	Add a substitute work site - George Washington Elementary	Details
11/16/2007	8:23:34 AM	Add a substitute work site - Mill Creek Elementary	Details
11/16/2007	8:23:34 AM	Add a substitute work site - Fairview Elementary	Details
11/16/2007	8:31:33 AM	Add new substitute's position	0 Details
11/16/2007	8:31:33 AM	Add new substitute's position	0 Details
11/16/2007	8:31:33 AM	Add new substitute's position	0 Details
11/16/2007	8:31:33 AM	Add new substitute's position	0 Details

The Change Log tab will show any changes made to the substitute record. On the initial Change Log screen you will see a list of all changes made to the particular substitute's record, along with some Display options. The Display options will allow you to select how many log entries are displayed on a page and will give you the ability to jump through the list a page at a time. Simply use the drop down arrows to make your selection.

The information in this screen will include the date on which the change was made, the time at which it was made, the type of change made, and who made the change. To view more specific details on a particular entry, click the **Details** hyperlink at the right of the entry.

The screenshot shows the 'CHANGE LOG DETAILS' screen in the Subfinder application. It includes a 'Close' button in the top right corner. The form contains the following fields: 'Person ID' (4094), 'Entered on' (11/01/2004 at 11:13 AM), 'Entry' (Add new substitute), 'Data' (Current and Previous fields), 'Station Name' (Data Exchange), 'How Entered' (Data Exchange), and 'User' (empty field).

The Change Log Details page will give you more specific details on the selected entry. It will include the date and time the change occurred, the type of entry made, the new information, the previous information (if applicable), how the change was entered, and who made the change. When you are finished viewing the information, click **Close** and you will return to the previous page.

The Main List Tab

Clicking on the Main List tab will return you to the initial Substitute List screen.

SubFinder - Internet Explorer provided by Dell

SubFinder

subfinder®

Substitute List

Selection Criteria

Get Substitutes Add Substitute

Last Name (starts with) First Name (s/n) Number (s/n) PIN (s/n) ID Phone# (s/n)

>= thomas

Substitutes

Display 20 rows on page 1 of 8

Edit	Last Name	First Name	MI	ID	Phone
Edit	Acey	Adrian	F	2154	(570)337-7623
Edit	Adamson	Richard	G	2158	(570)251-9511
Edit	Aikens	Alicia	P	2161	(565)555-1212
Edit	Allan	Linda	J	2169	(570)337-7623
Edit	Amato	Annabell	G	2178	(570)251-9514
Edit	Arnett	Bernice	A	2208	(570)251-9515
Edit	Athens	George	I	2217	(570)251-9516
Edit	Babbitt	Tim	G	2239	(570)251-9517
Edit	Balasco	Carol	A	2255	(570)251-9518
Edit	Bart	Charlotte	R	2285	(570)251-9519
Edit	Blean	Claire	M	2308	(570)251-9520

Done

Local intranet | Protected Mode: Off

100%

Editing a Substitute

Once a substitute has been added to SubFinder, you may need to make changes to the record. To edit a substitute's record, use the selection criteria as described in **Adding a Substitute** to locate the substitute and then click on the **Edit** hyperlink to the left of the substitute's name. The Edit Substitute screen will appear:

Substitute List

Availability | General Info | User Defined | Certification | Disqualification | Change Log | Schedule | Sites | Positions | Main List

Last Name	First Name	ID Number	FBI	Emp	Sub	Notice
Thomas	Elen	326845	326845	4094		

SUB GENERAL INFO

Note: Leaving this tab without saving will cause your changes to be lost

Max Days To Work: Hire Date: 11/16/2007

Total Days Worked: 0.0 Date Added: 11/16/2007

Certified Job Days: 0.0

Max Hours Per Week:

☒ Certified ☐ Preregistered

☐ Classified ☐ Restricted

☐ Inactive

Home Site Group:

Save

When you edit a substitute record, all fields can be changed as necessary, depending on the rights which you were granted by your SubFinder Operator. Once you have made the desired changes on each tab, click **Save** before moving to another tab. For details on specific fields, please refer to the section titled **Adding a Substitute**.

Preference Lists

Preference Lists are an integral part of the SubFinder system. Their primary use is to ensure that your best substitutes will get the first calls for open jobs. Simply stated, they are lists that specify which substitutes should, and in some cases *should not*, be called to fill a particular employee's absence.

Click on **Preference List** and the following screen will appear:

Preference Lists

Select Site: Benton Elementary **Add Preference List**

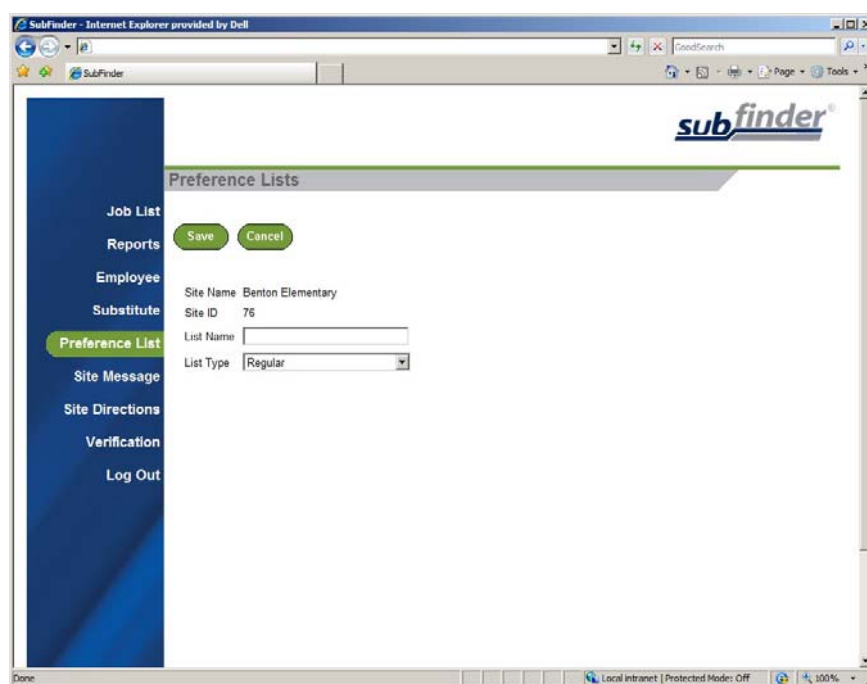
Edit	List Name	List ID	List Type
Edit	Skill List	1	Skill
Edit	Certificated Site Pref	1	Regular
Edit	Classified Site Pref	2	Regular
Edit	Fenton, Donald Personal Pref	4	Regular
Edit	Site Exclusion	3	Site Exclusion List

There are three basic types of preference lists that you may want to use:

1. **Personal Preference List:** This list would typically be applied to a single employee. It is a list of substitutes, usually specified by the employee, which they have had positive experiences with in the past.
2. **Subject-Based Preference List:** This list would typically be applied to a group of employees who have the same job position. It is a list of substitutes who are considered to be above average in a particular subject area or position. For example: You may create a preference list to be used for all Boys PE teachers.
3. **Site-Based Preference List:** This list would be applied to all employees at a particular site. It is a list of substitutes who are capable of filling in for any employee within the building. You must be very careful using a site-based list since preference lists do not take job position into consideration.

Adding a Preference List

To add a preference list, first choose the appropriate site from the drop down list and then click **Add Preference List**. The following screen will appear:



The screenshot shows the Subfinder web application running in Internet Explorer. The left sidebar contains a menu with options: Job List, Reports, Employee, Substitute, Preference List (highlighted), Site Message, Site Directions, Verification, and Log Out. The main content area is titled 'Preference Lists' and includes a 'Save' button and a 'Cancel' button. Below these buttons, the form displays the following information: Site Name: Benton Elementary, Site ID: 76, List Name: (empty text box), and List Type: Regular (dropdown menu). The Subfinder logo is visible in the top right corner of the main content area.

- **List Name:** What do you want to call the list? We suggest using a descriptive name that will indicate the purpose of the list. For example:
 - **Regular Lists:** English PL (a position-based preference list), Smith, J PPL (an employee's personal preference list), Rocky Hills Elem. SPL (a site-based preference list).
 - **Personal Exclusion Lists:** Smith, J PEL (an employee's personal exclusion list), Secretarial EL (a position-based exclusion list).
 - **Personal Permanent Sub List:** Smith, J PPS (an employee's personal permanent sub list).
 - **Site Exclusion List:** Rocky Hills SEL (a site-based exclusion list).

- **Site Permanent Sub List:** Rocky Hills SPS (a site-based permanent sub list).
- **List Type:** What type of list are you creating? You can choose from six different list types:
 - **Personal Exclusion List:** This is a list of substitutes who are to be excluded from filling a particular absence. These lists can be employee-based (substitutes who should not be called for a particular employee) or position-based (substitutes who should not be called for any employee that works in a particular position). You can create as many Personal Exclusion Lists at a site as necessary. This list must be assigned to the individual employee(s).
 - **Personal Permanent Sub List:** This is a list of substitutes who will always fill in for a particular absence. These lists can be employee-based (substitutes who will fill in for a particular employee) or position-based (substitutes who will fill in for a particular position). You can create as many Personal Permanent Sub Lists at a site as necessary. It is important to note that a permanent substitute is NEVER called by SubFinder. SubFinder will assign the permanent substitute(s) to the first absence(s) created for the employee(s) on any given day, as long as the employee has not Requested or Prearranged someone else. This list must be assigned to the individual employee(s).
 - **Regular List:** This is a list of substitutes who should be called for a particular absence. These lists can be employee-based (substitutes who will fill in for a particular employee), position-based (substitutes who will fill in for a particular position), or site-based (substitutes who will fill in for any absence at the site). You can create as many Regular Lists at a site as necessary. This list must be assigned to the individual employee(s).
 - **Site Exclusion List:** This is a list of substitutes who are to be excluded from an entire site. This list will automatically be assigned to all employees who have the site listed as their **Home Site** on the General Information Tab of their employee record. You can only create one Site Exclusion List per site.
 - **Site Permanent Sub List:** This is a list of substitutes who will always fill in for any employee at the site. This list will automatically be assigned to all employees who have the site listed as their **Home Site** on the General Information Tab of their employee record. It is important to note that a permanent substitute is NEVER called by SubFinder. SubFinder will assign the permanent substitute(s) to the first absence(s) created at the site, when a substitute has not already been Requested or Prearranged, on any given day. You can only create one Site Permanent Sub List per site.
 - **Alternate Site Permanent Sub List:** This is a second list of substitutes who will always fill in for any employee at the site. This list will automatically be assigned to all employees who have the site listed as their **Home Site** on the General Information Tab of their employee record. It will be used after the Site Permanent Sub List. It is important to note that a permanent substitute is NEVER called by SubFinder. SubFinder will assign the permanent substitute(s) to the first absence(s) created at the site, when a substitute has not already been Requested or Prearranged, on any given day. You can only create one Alternate Site Permanent Sub List per site.

Once you have entered the List Name and List Type, click **Save**. The Assign Subs screen will appear.

The Assign Subs Tab

The screenshot shows the Subfinder web application in an Internet Explorer browser. The left sidebar contains navigation links: Job List, Reports, Employee, Substitute, Preference List (highlighted), Site Message, Site Directions, Verification, and Log Out. The main content area is titled 'Preference List' and includes tabs for Assign Subs, Assign Emos, Rank Lists, Copy List, Edit Name, Delete List, and Main List. Below these tabs is a table with columns: List Name, List ID, Site Name, Site ID, and List Type. The table contains one entry: Benlon SPL, 5, Benlon Elementary, 76, Regular. Below this is the 'SUBSTITUTE PREFERENCE ASSIGNMENT' section. It includes a note: 'Note: Leaving this tab without saving will cause your changes to be lost.' and a 'Save' button. The section is divided into two main areas: 'Available Subs' and 'Assigned Subs'. The 'Available Subs' area has a 'Display' dropdown set to 20 and 'rows on page' set to 1 of 8. It contains a table with columns: Select, Sub Name, and Sub ID. The table lists 15 substitutes with checkboxes in the 'Select' column. The 'Assigned Subs' area has a 'Clear' button and 'Up' and 'Down' buttons. It contains a table with columns: Select, Sub Name, Sub ID, and Rank. The table lists 3 substitutes with checkboxes in the 'Select' column.

List Name	List ID	Site Name	Site ID	List Type
Benlon SPL	5	Benlon Elementary	76	Regular

SUBSTITUTE PREFERENCE ASSIGNMENT

Note: Leaving this tab without saving will cause your changes to be lost. Save

Available Subs

Display: 20 rows on page 1 of 8

Select	Sub Name	Sub ID
<input type="checkbox"/>	Acey, Adrian	2154
<input type="checkbox"/>	Adamson, Richard	2158
<input type="checkbox"/>	Aikens, Alicia	2161
<input type="checkbox"/>	Allan, Linda	2169
<input type="checkbox"/>	Amato, Annabell	2178
<input type="checkbox"/>	Arnett, Bernice	2208
<input type="checkbox"/>	Athens, George	2217
<input type="checkbox"/>	Babbitt, Tim	2239
<input type="checkbox"/>	Balasco, Carol	2255
<input type="checkbox"/>	Bart, Charlotte	2285
<input type="checkbox"/>	Bishop, Anthony	2389
<input type="checkbox"/>	Bosco, Elaine	2433

Assigned Subs

Clear Up Down

Select	Sub Name	Sub ID	Rank
<input type="checkbox"/>	Thomas, Ellen	4094	1
<input type="checkbox"/>	Bean, Claire	2308	2
<input type="checkbox"/>	Cuthrey, Jean	2561	3

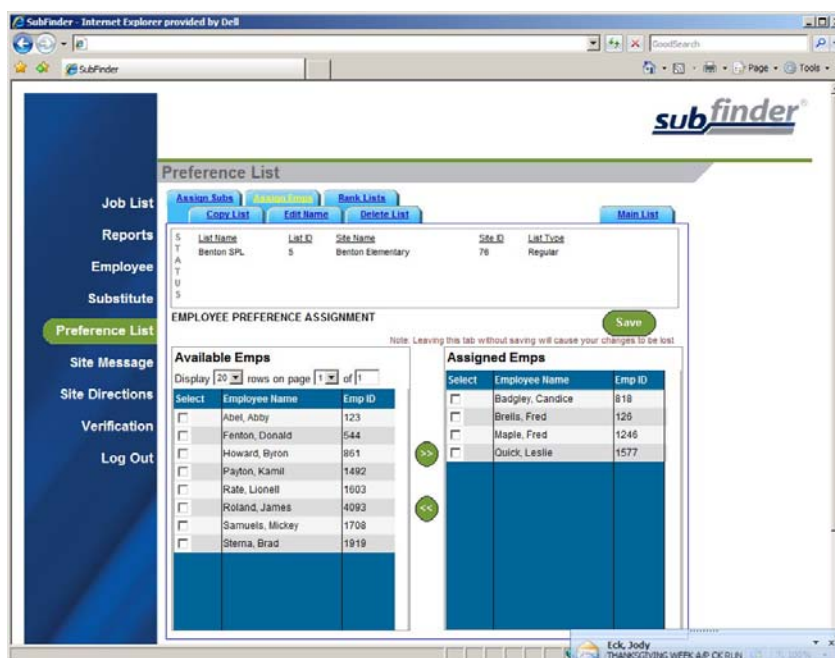
Select those substitutes that you wish to include on the list by placing a check in the box beside their names in the **Available Subs** list. Once you have made your selection, click **>>** to move the substitutes to the **Assigned Subs** list.

If you add a substitute to the list by mistake, simply place a check in the box next to his/her name and click **<<**. The name will be transferred back to the available subs list.

If the substitutes are not in the desired calling order within the Assigned Subs list, you can move them by placing a check in the box next to their names and clicking **Up** or **Down** to change their position in the list. Clicking **Clear** will remove any check marks within the **Select** column.

Once you are satisfied with the list of assigned substitutes, click **Save**.

The Assign Employees Tab

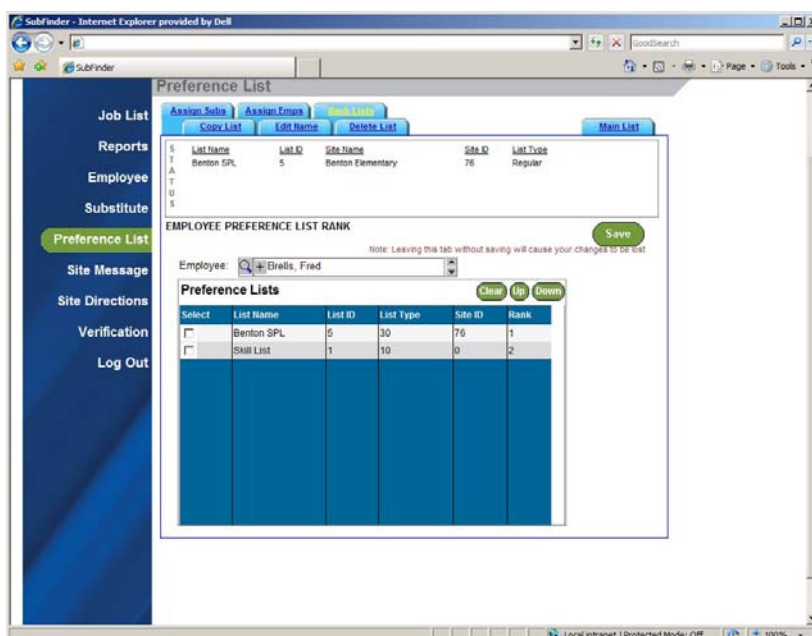


To which employees would you like this preference list assigned? To assign the list to a specific employee, place a check in the box beside the employee name in the **Available Employees** list and click >>. The employee will be moved to the **Assigned Employees** list. If an employee was accidentally moved to the Assigned Employees list or if you wish to remove an employee from the list, place a check in the box beside the employee's name and click <<. This will remove the employee from the list.

Once you are satisfied with the list of assigned employees, click **Save**.

NOTE: When assigning Preference Lists to employees, the list is automatically placed at the end of the **Employee's Preference List Rank**. Please refer to the Rank List Tab section for instructions on how to order Preference Lists.

Rank List Tab

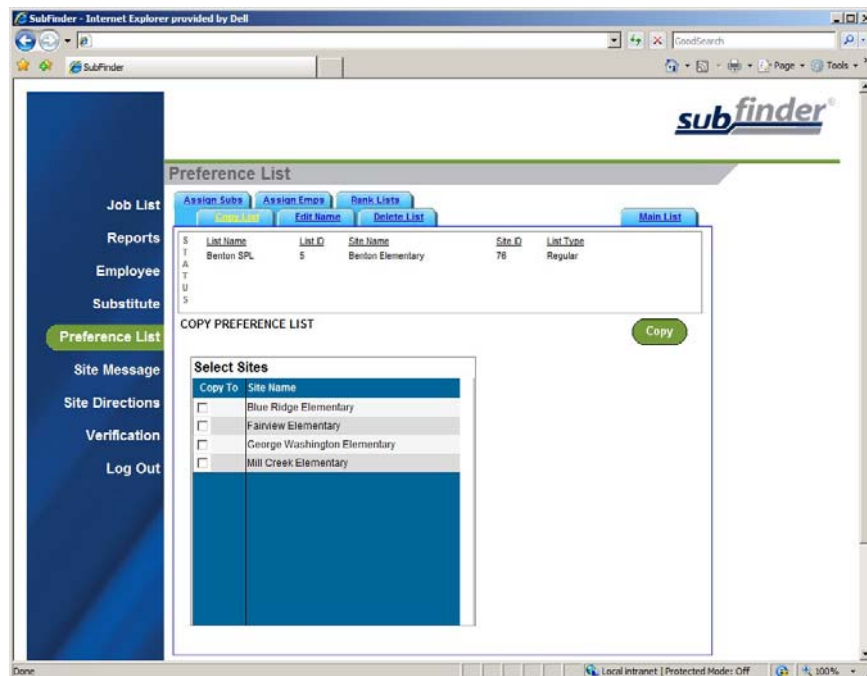


Once you have assigned the lists, you must place them in the proper order. The order of the assigned lists is very important; since SubFinder will call through them in the order they are assigned. Click on the **Rank List Tab**. If the lists are not in the desired order, place a check next to the list you would like to move and click **Up** or **Down** until the list is in its proper place. Clicking **Clear** will remove any checkmarks. Once all lists are in the correct order, click **Save**.

NOTE: If you created a Site Exclusion list or a Site Permanent Sub list for this site, they will not appear on this screen. They are automatically assigned to all employees at the site and are not available for assignment or ranking.

Copy List Tab

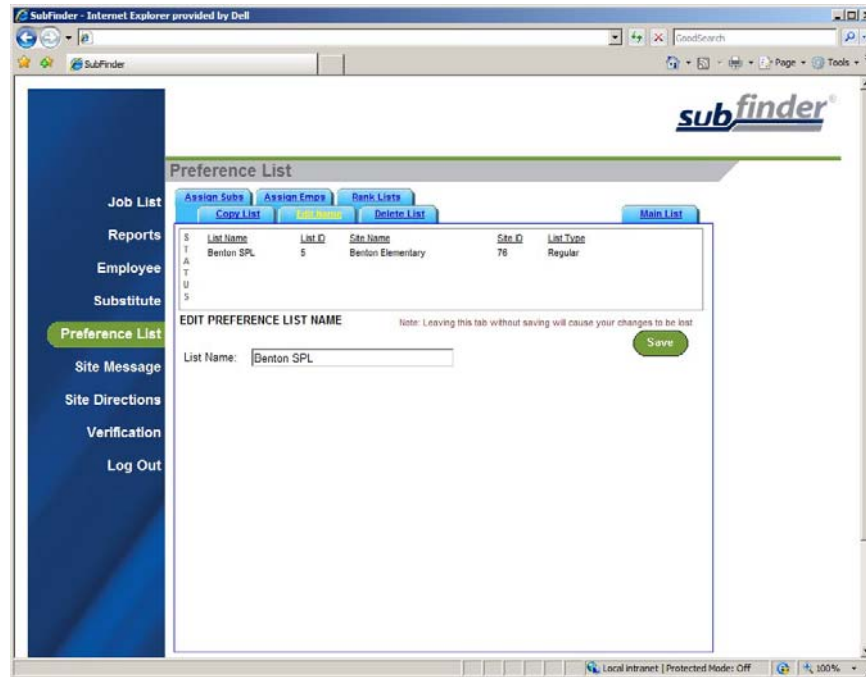
The Copy List tab will allow you to copy the selected Preference List to other sites within your site group. This can be very useful when creating subject-based lists that might apply to additional sites. Simply place a check in the box next to the site(s) to which you wish to copy the list and click **Copy**. Please keep in mind that you will still need to assign the list to the appropriate employees once it has been copied.



NOTE: If you are a single site administrator, you will not be able to copy a preference list to another site. The Selected Sites box will contain a message stating "No sites available."

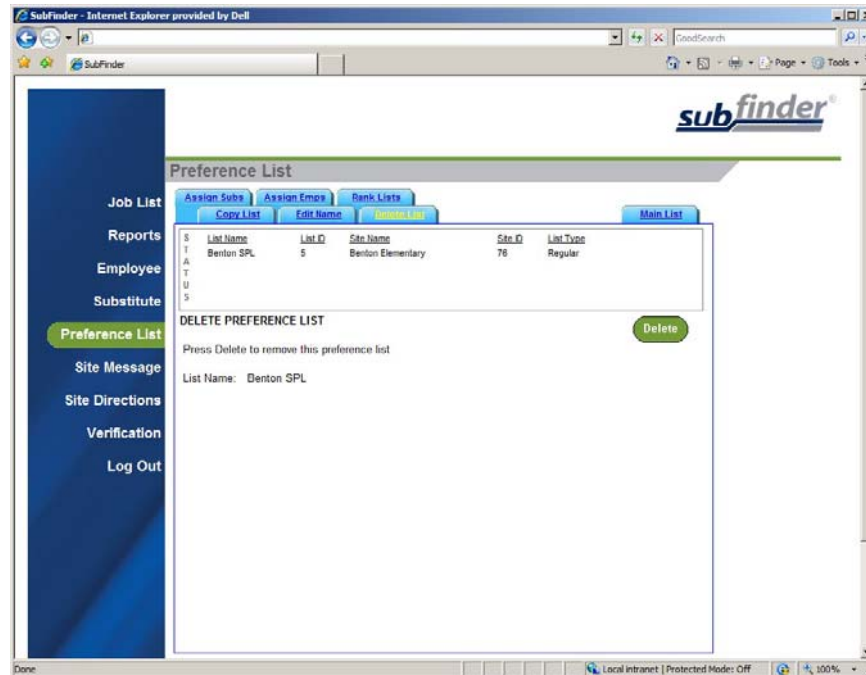
Edit Name Tab

The Edit Name tab will allow you to change the preference list name. Simply make the change and click **Save**.



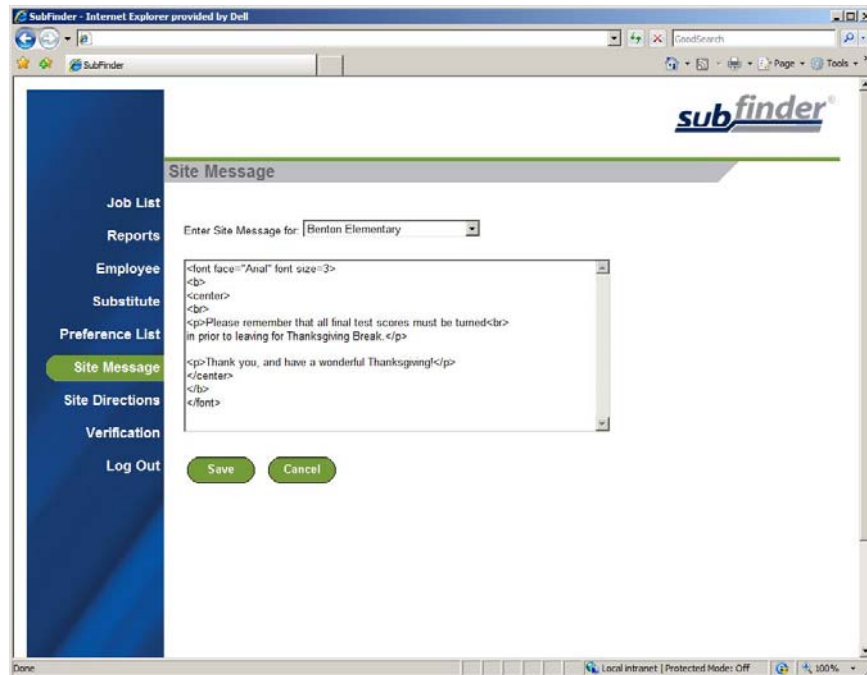
The Delete List Tab

You can delete a preference list from the Delete List tab. To delete the list, click **Delete**. The list will be deleted and you will be returned to the Main List.



Site Message

The Site Message can be used to convey important information or announcements to your employees. To enter a message for your employees, click **Site Message**.



The screenshot shows a web browser window titled "SubFinder - Internet Explorer provided by Dell". The address bar shows "GoodSearch". The SubFinder logo is in the top right corner. On the left is a blue sidebar with a menu: Job List, Reports, Employee, Substitute, Preference List, Site Message (highlighted in green), Site Directions, Verification, and Log Out. The main content area is titled "Site Message". It contains a dropdown menu labeled "Enter Site Message for:" with "Benton Elementary" selected. Below this is a large text area containing HTML code: ``, ``, `<center>`, `
`, `<p>Please remember that all final test scores must be turned
in prior to leaving for Thanksgiving Break.</p>`, `<p>Thank you, and have a wonderful Thanksgiving!</p>`, `</center>`, ``, and ``. At the bottom of the form are "Save" and "Cancel" buttons. The browser status bar at the bottom shows "Done", "Local intranet | Protected Mode: Off", and "100%".

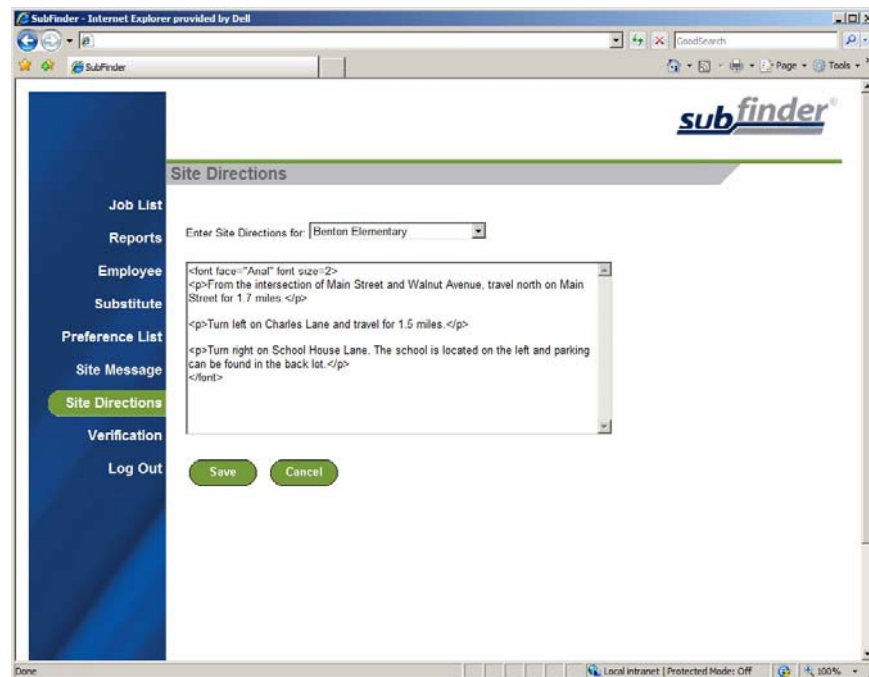
If you are a site administrator for a single site, your site will automatically be displayed in the **Enter Site Message for** field. If you are a site group administrator, you can use the drop down arrow at the end of the field to select the appropriate site.

Use the text-entry box to create the message. By default, text entered here will be displayed as simple text to your employees. However, if you are familiar with basic HTML tags, they can be used to apply different types of formatting such as line breaks, paragraph returns, bolding, and centering.

Once your message is complete, click **Save**.

Site Directions

Site Directions are used to provide basic location information to your substitutes. To enter directions to your site(s), click **Site Directions**.



If you are a site administrator for a single site, your site will automatically be displayed in the **Enter Site Directions for** field. If you are a site group administrator, you can use the drop down arrow at the end of the field to select the appropriate site.

Use the text-entry box to create the directions. By default, text entered here will be displayed as simple text to your substitutes. However, if you are familiar with basic HTML tags, they can be used to apply different types of formatting such as line breaks, paragraph returns, and bolding.

Once your directions are complete, click **Save**.

Verification

Before the absences and jobs in SubFinder are submitted to payroll, they may require verification. If your district is using the Verification feature, all absences and jobs must be verified before they can be exported to your payroll system.

Click on **Verification** and the following screen will appear:

Edit	ID	Job Date	Substitute	Employee	Site	Verify Status/Date	Log
Lot 71	11/08/2007	Amato, Annabell	Abel, Abby	Benton Elementary	U	Log	
Lot 73	11/08/2007	Vaneck, Shawn	Payton, Kamil	Benton Elementary	U	Log	
Lot 74	11/15/2007	Hoffman, Bret	Quick, Leslie	Benton Elementary	U	Log	
Lot 83	11/15/2007	No Substitute	Payton, Kamil	Benton Elementary	U	Log	
Lot 84	11/15/2007	Bishop, Anthony	Samuels, Mickey	Benton Elementary	U	Log	
Lot 85	11/15/2007	Higgs, Booker	Supplementary Assignment	Benton Elementary	U	Log	
Lot 74	11/16/2007	Hoffman, Bret	Quick, Leslie	Benton Elementary	U	Log	
Lot 84	11/16/2007	Bishop, Anthony	Samuels, Mickey	Benton Elementary	U	Log	
Lot 85	11/16/2007	Aikens, Alicia	Maple, Fred	Benton Elementary	U	Log	

The Verification screen contains the following components and buttons:

- **Pay Period:** Allows you to select the appropriate pay period for which jobs must be verified. Entries for the selected pay period will appear in the Job List at the bottom of the screen.
- **Current Pay Period Verification Status:** This will display the status of the currently selected pay period. The status will either be listed as Complete or Incomplete.
- **Prior Pay Period Verification Status:** This will display the status of the pay period prior to the currently selected pay period. The status will either be listed as Complete or Verification Required.
- **Job Display:** Allows you to determine what information will be displayed in the Job List at the bottom of the screen. You may choose **Substitute and Employee** (shows both the substitute and employee names), **Employee** (shows the employee name but not the substitute name), or **Substitute** (shows the substitute name but not the employee name).
- **Selection Criteria:** You may use these items to refine the list of jobs that appear in the Job List at the bottom of the screen. To use a selection criteria, place a check in the box to the left of the criteria and then fill in the appropriate information.
 - **ID:** By selecting this option and entering a “first ID” and “last ID”, you can specify the job ID range that will be covered in the Job List display. Note: The display will not include any jobs that fall within the ID range but do not fall within the Pay Period selected at the top of the screen.
 - **Date:** By selecting this option and entering a “first date” and “last date”, you can specify the period that will be covered in the Job List display. You can either enter a specific date

or date range manually in a MMDDYY format or use the calendar feature to select the dates. For example: January 11, 2008 would be entered 011108. Note: The date range must fall within the Pay Period selected at the top of the screen.

- **Site:** If your district has set you up as a site group administrator, you will be able to select the site for which you would like to verify jobs from the dropdown box provided. If you have been set up as a single site administrator, you will only see the site you have been assigned.
- **Employee:** You may choose to display only those jobs associated with a particular employee.
- **Substitute:** You may choose to display only those jobs filled by a particular substitute.
- **Process Status:** By selecting this option, only those jobs that match the specified status will be displayed.
 - **Not Processed:** All jobs will start with this status. It indicates that the job has not been processed by the Data Exchange export program.
 - **Processed:** This indicates that the job has been exported by the Data Exchange program.
 - **Post-Modified Processed:** This indicates that the job was modified *after* being verified and then exported by the Data Exchange program. Since the information has already been sent to Payroll, these jobs typically require special handling.
- **Verify Status:** By selecting this option, only those jobs that match the specified status will be displayed.
 - **Unverified:** All jobs will start with this status. It indicates that the job has not been verified. In the Job List, this status will be represented by the letter **U**.
 - **Verified, Approved:** This indicates that the job has been reviewed by either the system operator or the site administrator and the information is *correct*. Once approved, the data is available for export by the Data Exchange program. In the Job List, this status will be represented by the letter **A**.
 - **Verified, Disapproved:** This indicates that the job has been reviewed by either the system operator or the site administrator and the information is *incorrect*. Jobs with a status of Verified, Disapproved are *not* available for export by the Data Exchange program. In the Job List, this status will be represented by the letter **D**.
- **Order By:** Use this to select how the jobs will be ordered. Choose either **Date** or **ID**.

Once you have made your selections from the Selection Criteria, click Run Request. SubFinder will display the jobs that match your selected criteria in the Job List display.

Verifying Jobs

Within the Job List, find the job you wish to verify and click the Edit hyperlink to the right of the job. SubFinder will display the following screen:

Employee Information		Substitute Information		Verification Information	
Start Date/Time	11/06/2007 11:00 AM	Start Date/Time	11/06/2007 11:00 AM	<input type="radio"/> Verify, Approved	
End Date/Time	11/06/2007 02:00 PM	End Date/Time	11/06/2007 02:00 PM	<input type="radio"/> Verify, Disapproved	
Total Hours	3.00	Time Adj	0.00	<input type="radio"/> Unverify	
		Total Hours	3.00	Verified Date	
				Status	Not Processed

Site: Benton Elementary
Employee: Abel, Abby
Position: Elementary Grade 1
Reason: A101 Sick Leave/Swing
Substitute: Amato, Annabell
Personal Budget Code:

No Substitute

Save Close

The main purpose of this screen is to indicate the verification status of the job. However, this screen can also be used to make changes to the job, including the absence time (employee information), job time (substitute information), site, employee, position, reason, substitute, account code and personal budget code.

- **Employee Information:** If you are verifying a job which is the result of an employee's absence, this field will display the specific date and times of the absence. You may edit the absence start and end times if necessary.
- **Substitute Information:** If a substitute was required for the absence or if you are verifying a no-employee job, this field will display the substitute job date and times. You may edit the job start and end times if necessary. **If your district is** using the time adjustment feature within SubFinder, the correct adjustment time will also display in this field. You may edit this field if necessary.
- **Verification Information:**
 - **Verify, Approved:** This indicates that the job has been reviewed by either the system operator or the site administrator and the information is *correct*. Once approved, the data is available for export by the Data Exchange program.
 - **Verify, Disapproved:** This indicates that the job has been reviewed by either the system operator or the site administrator and the information is *incorrect*. Jobs with a status of Verified, Disapproved are **not** available for export by the Data Exchange or Data Exchange Pro programs.
 - **Unverify:** Indicates that the job has not been verified.
 - **Verified Date:** This field will display the date on which the absence/job was verified by the SubFinder Operator or site/site group administrator.

- **Status:** Under normal circumstances, this field will display a status of either processed or not processed. If the record has been processed the absence and job data has been exported for payroll using either Data Exchange or Data Exchange Pro. If the status reads not processed, the data has not been exported for payroll.
- **Site:** This field displays the site at which the absence and/or job occurred.
- **Employee:** If there is an employee absence, the employee's name will appear in this field.
- **Position:** This field contains the absent employee's primary job position as indicated in the employee's individual record. If this is a no-employee job, the job position selected in creating the job will appear instead.
- **Reason:** The reason selected for the particular absence or job is listed in this field.
- **Substitute:** If a substitute was required for an employee absence or filled a no-employee job, the substitute's name will appear in this field.
- **No Substitute:** You can use this to remove the substitute from the job, or the particular day of a multiple-day job.
- **Account Code:** If a miscellaneous code was entered at the time the absence/job was created, it will appear in this field. The Account Code field does not accept manually entered miscellaneous codes; one must be chosen from the dropdown list. **NOTE:** This field may not appear on your screen.
- **Personal Budget Code:** If the absent employee has a specific budget code entered in their personal budget code User Defined field, the code will display in this field and will also be included in the Verification Export. **NOTE:** This field may not appear on your screen.

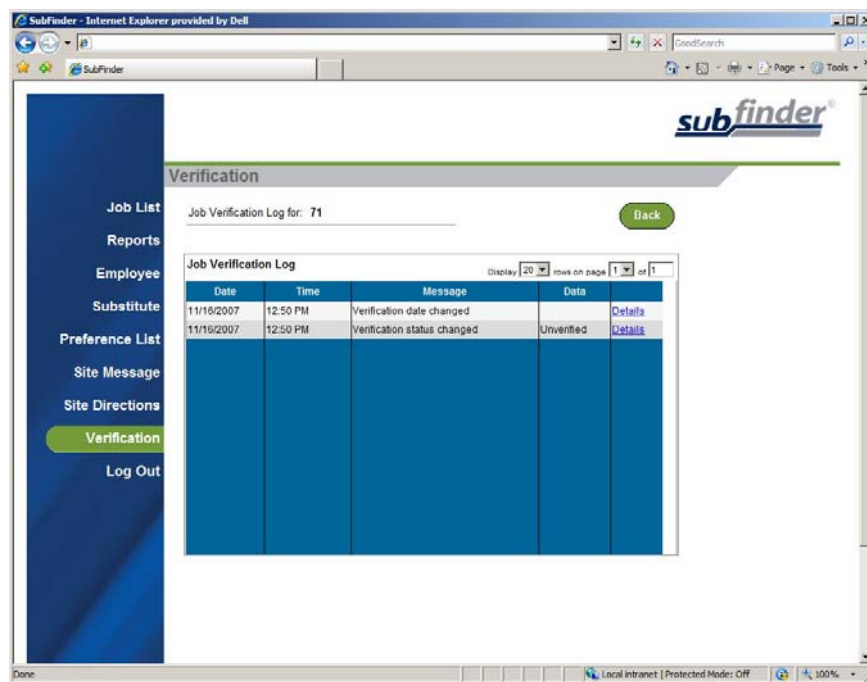
To verify the job:

1. Indicate the verification status (Verify, Approved or Verify, Disapproved) by clicking on the appropriate radio button within the Verification Information box. **Verify, Approved** means that the information is correct and can be exported to Payroll by the Data Exchange program. **Verify, Disapproved** means that the information is incorrect and cannot be exported to Payroll by the Data Exchange program.
2. If you have not already done so, and if available, select the appropriate Account Code by clicking on the arrow at the end of the account code field and choosing one from the list presented.
3. Click **Save**. SubFinder will save the record and return you to the Verification screen.

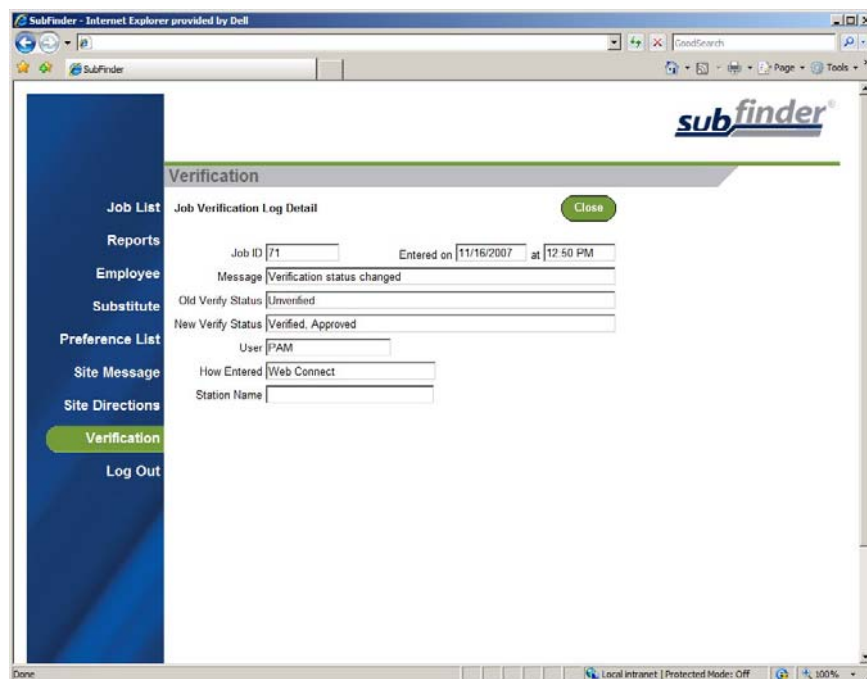
Viewing the Verification Log

Each time a job record is verified, a Verification Log is created to record the activity that occurs. The Verification Log contains major activity that occurs throughout the verification process.

The Verification Log can be accessed from the Verification Job List display. Within the job list, find the job you wish to verify and click the **Log** hyperlink to the right of the job. SubFinder will display the following screen:



To see more detail about a particular log entry, click the **Details** hyperlink to the right of the entry. The Job Verification Log Detail screen will appear:



The Job Verification Log Detail screen will give you more specific details on the selected entry. The information may include (if applicable) a message, old and new information, and who completed the transaction.

When you are finished viewing the information, click **Close** and you will be returned to the previous screen. Then click **Back** located just above the Job Verification Log box and you will return to the initial Job List.

Log Out

When you are ready to leave SubFinder, click **Log Out**. You will return to the SubFinder Log In screen.

